Commercial Carrier Journal...

for Private Fleets & For Hire Trucking

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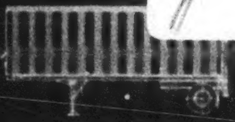

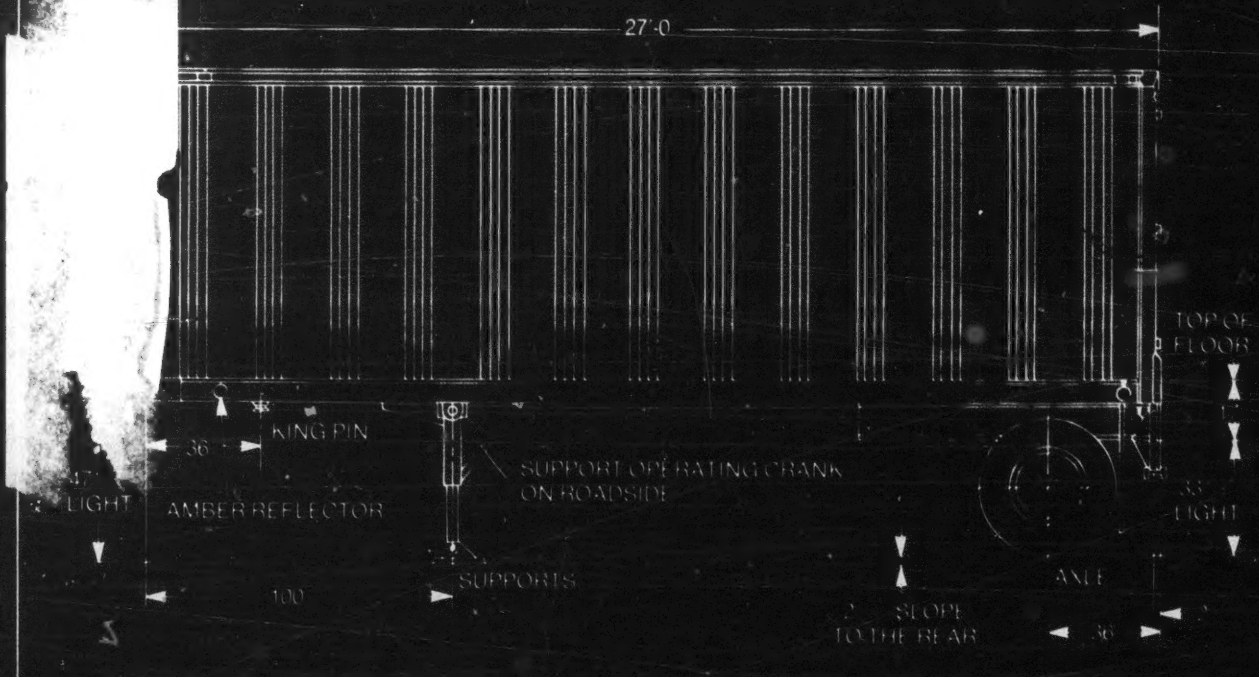
27'-0
TOP OF FLOOR
KING PIN
36
47 LIGHT
AMBER REFLECTOR
SUPPORT OPERATING CRANK ON ROADSIDE
100
SUPPORTS
2
SLOPE TO THE REAR
AXLE
36
33 LIGHT

Commercial Carrier Journal

Published As Commercial Car Journal Continuously Since 1911
CARL W. LOCK, *Publisher/Editorial Director*
GERALD F. STANDLEY, *Editor*

VOLUME 139 NUMBER 11 NOVEMBER 1982

NEW DEPARTMENTS!

Fleet Forms: PMs, VCRs, Fuel Reports. . . . forms used in every aspect of fleet operations need constant updating. Turn to page 36 and see if this month's form will help you improve yours.

Info Watch: Computers for Transportation Managers. See page 54.

An ABC publication

Chilton

BUSINESS MAGAZINES/MARKETING SERVICES/BOOKS

COMMERCIAL CARRIER JOURNAL (ISSN 0734-1423), one of the publications owned by CHILTON COMPANY, is published monthly at Chilton Way, Radnor, Pa. 19089. Chilton Co. is a division of American Broadcasting Companies, Inc., New York, N.Y. Subscription price: United States and its possessions $30.00 a year; single copies are $3.50 a copy with the exception of special issues (April, June, October) which are $6.00 each. Canada and all other countries are $65.00 a year, payable in advance. Second Class Postage Paid at Wayne, PA 19087 and additional mailing offices. Title registered in U.S. Patent Office. Postmaster: Send form 3579 to Commercial Carrier Journal, Box 2045, Radnor, Pa. 19089.

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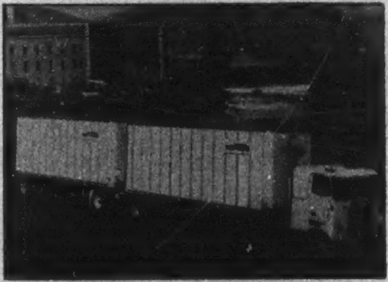

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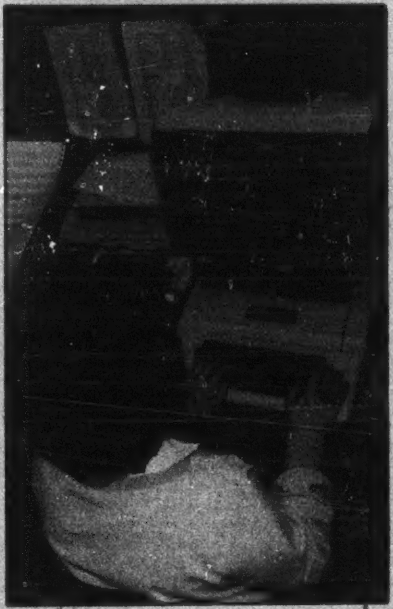

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Double Bottom Trailers: Spec'ing For The Eighties

Double bottom trailers continue to grow in popularity as restrictions against them are lifted. Here are some pointers to use when spec'ing and for getting the best return on investment. **70**

Million Mile Maintenance

When maintenance means money, you find a way to keep trucks running—or you get out of business. Erwin Hurner has worked out ingenious ways to keep trucks on the road. This story is about him and his unique maintenance philosophy. **75**

Ratemaking: Closing Another Chapter

A special 10 member Motor Carrrier Ratemaking Commission will report to Congress on Jan. 1. But Washington "insiders" believe the future of collective ratemaking may already be settled. This behind-the-scenes report tells you why. **78**

Computers Mean Profit

Carriers who ". . . ain't got no truck with computers" may soon not have any trucks. Period. Computers are honing cost and productivity control to a sharpness no human mind can match. Technology is today's path to profit. **83**

Maintenance Shop

The lowly wheel is easy to forget. But, it too, has maintenance needs. If you neglect those needs, it can let you down in a lot of expensive ways. **TMS-1**

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PRIVATE FLEET COST INDEX
JULY-DECEMBER 1981 SURVEY RESULTS vs. JANUARY-JUNE 1981
PRIVATE FLEET COSTS: TRACTOR/TRAILER EQUIPMENT

Tractor/Trailer Type	Cost Per Mile			
	General and Administrative	Drivers	Equipment	Total (1)
Tank				
Dry Van				
Refrigerated				
Flatbed				
Open Top				
Other				
Mixed				
All Tractor/ Trailer Fleets				

(1) Numbers may not add; they represent average costs for those companies that provided information for the category shown.

SOURCE: PTCA, A.T. KEARNEY

LATE NEWS WIRE

Consolidated Freightways says third and fourth quarter income for the Palo Alto, Calif.-based carrier will lag 15% to 20% behind the same period last year. Vice president Donald Moffitt told a group of institutional investors the company sees few signs of a business upturn and continues to experience rising costs and intense price competition. "Although we are pleased with our operating performance and market share in this dismal 1982 economy, we are continuing to absorb the costs of expansion, and profitability is suffering accordingly," he said.

Smith's Transfer Corp. of Stauton, Va., a subsidiary of ARA Services, Philadelphia, has gone through a corporate restructuring. Smith's president Joseph Gilbert said the basic purpose of (these) changes ". . . is to enable everyone to be more customer oriented, to better understand their needs and to better serve them." The streamlining includes a reduction in the number of people reporting to the president to six from 14 and the establishment of two regions, western and eastern, plus 10 divisions, each of which will be its own profit center.

Private truck council survey reflects increased operating costs; results questionable due to limited response

By **LEO ABRUZZESE**, *Washington Editor*

Private fleet operating costs rose 7% in the second half of 1981, according to a new and still controversial study from the Private Truck Council of America.

Statistics compiled for PTCA by A. T. Kearney, Inc., peg the average cost of operating a private tractor-trailer fleet at $1.25 per mile from July through December 1981. Costs for the preceding six months averaged $1.17 per mile.

"The new data will assist private fleet executives to track operating cost trends and help them become better professional managers," PTCA executive vice president Richard Henderson said.

The survey remains controversial, however, because of the limited sample size and accuracy of information supplied by participating carriers. Only 215 fleets joined in the survey, although that was a 22% increase over the 177 who responded to the original January to June review. Information was also collected randomly, not scientifically, raising further doubts about accuracy. However, the PTCA survey remains the only comprehensive attempt to gather private fleet costs, and Kearney researcher Michael Lipman calls the figures "useful."

"We don't expect a private fleet manager to make major decisions based solely on this information," Lipman said. "However, it is a useful management tool . . . The statistics are meaningful."

Walter Weymouth, director of private carriage for GTE Products of Danvers, Mass., believes the surveys are valuable but called the first January to June study ". . . a little too broad." Weymouth, who is also a PTCA vice president, added:

Continued

Survey reflects increased operating costs continued

"We tried to refine the second survey and make it a little more specific. I think our members realize it's going to take a little more time to get this right."

Weymouth said the survey is the only comparative tool private fleet managers have. "The only alternative," he said, "is to sit down with other carriers and compare notes. That's not very helpful since you don't know what you're comparing. All you can do is guess."

Lipman said he was pleased by the 22% increase in respondents to the most recent survey. However, only 66 of the original 177 participants were among the 215 who joined in the second study. Henderson believes the drop-off may have occurred because some fleets thought it repetitive to participate in two surveys in one year.

"Obviously, the second survey was useful because it showed the 7% increase in operating costs," Henderson said. PTCA attributes the hike to reduced utilization of drivers and equipment resulting from the business downturn in the second half of 1981. Most of the fleets surveyed experienced a decrease in the average miles per tractor and miles per driver.

Lipman compiled data for tractor-trailer fleets, straight truck van fleets and mixed fleets which have a combination of both types. He admits data for the straight truck van and mixed fleets "is not very reliable" because of the few responding carriers.

A statistical breakdown of the survey for tractor-trailer fleets for the second half of 1981 follows:

- Respondents by industry: Chemicals and plastics carriers are the most numerous, followed by food haulers.
- Types of fleets: Of the 215 respondents, 177 were tractor-trailer fleets, 12 straight truck/van operations and 27 mixed fleets. Eighty percent of a fleet's vehicles must be tractor-trailers to fall into that category.
- Operating statistics: The study represented more than 7600 tractors, over 10,000 drivers and included total mileage of 726,600,000. Average miles per tractor: 100,300.
- Drivers cost $.52 per mile, a five percent increase. Equipment rose from $.62 in the January to June survey to $.66 in the July to December study. Total cost per mile was $1.25, compared to $1.17 for the first half of the year. The acceptable interval for all tractor-trailer fleets is between $1.19 and $1.31 per mile.
- Unions and leasing: Company owned fleets with non-union drivers had per mile costs of $1.16. If the drivers were unionized, costs increased to $1.34.

Leased fleets with non-union drivers had per mile costs of $1.11. Leased fleets with union labor recorded $1.39 per mile costs.

- Equipment: Fleets that owned their equipment had operating costs of $1.19 per mile. Fleets with leased vehicles posted $1.29 per mile. Carriers with mixed owned/leased equipment averaged $1.26. Kearney's figures also show that leased vehicles, on average, accumulated more miles per trip than owned equipment.
- Length of haul and fleet size: For tractor-trailer fleets operating less than 250 miles per trip, total costs averaged $1.68 per mile. Over 250 miles per trip, the figure dropped to $1.18.
- Costs per region of operation: It cost the most to operate in the midwest, at $1.21 per mile; the least in the Canadian provinces at $1.12 per mile.
- Intercorporate hauling and Toto authority: 81 fleets were participating in ICH, up from 65 for the first six months of the year. Sixteen carriers now have Toto authority, up from four in the earlier survey. More fleets also plan to apply for Toto grants.

More than 100 carriers would consider single-source leasing, if the courts permit it. Twenty-one fleets now have separate transportation subsidiaries and another 15 plan to start them.

PRIVATE FLEET COST INDEX
JULY-DECEMBER 1981 SURVEY RESULTS
vs. JANUARY-JUNE 1981
PRIVATE FLEET OPERATING COSTS

	Cost Per Mile		
Cost Category	Tractor/Trailer	Mixed Fleet	Straight Truck/Van
General & Admin			
Drivers			
Equipment			
Total[1]			

	95% Confidence Interval
Tractor/Trailer	
Mixed Fleet	
Straight Truck/Van	

[1] Numbers may not add: they represent averge costs for those companies that provided information for the category shown.

Source: PTCA—A. T. Kearney

CHILTON'S APRIL 1983

Commercial Carrier Journal...

for Private Fleets & For Hire Trucking

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FLEET REFERENCE

ANNUAL

- Rules & Regulations
- Directory of Certified LP Gas Installers
- Shop Tool & Equipment Buyers' Guide
- Directory to National & Local Fleet Associations
- Guide to Federal Regulatory Agencies
- Technical Data Directory

STATISTICAL REFERENCE INDEX C-22
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VOLUME 140 NUMBER 4 APRIL 1983

Parts Warnings Issued

Fleet operators should be concerned this month over two warnings issued for possible equipment failures. One involves aluminum spring brake caps (see page 24). The second involves fifth wheels (see page 170). Meanwhile, industry fears that some eastern states will thwart DOT plans over access for doubles. Look for court action in New Jersey, Georgia, Vermont and Connecticut as states fight to keep bigger trucks off their roads.

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DELAWARE
GEORGIA FUEL TAX
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1982
MICHIGAN

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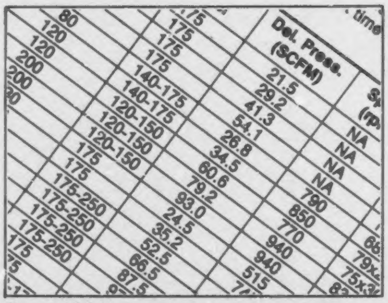

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RULES AND REGULATIONS

Here is the updated information you need to keep your fleet legal:

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- Directory of state officials to contact for permits and tax information **90**
- State-by-state vehicle size and weight limit maps and charts **94**

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An exclusive CCJ national directory of lp-gas installers/converters certified by the National LP Gas Association. **111**

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This guide tells you what each agency does and includes addresses, telephone numbers, names and titles of individuals. **151**

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Fast product information! CCJ offers post cards you can use to obtain the latest catalogs and brochures on a number of products. **158**

Fifth Circuit rules against ICC's fuel compensation plan

From CCJ's Washington Bureau

The Interstate Commerce Commission overstepped its authority when it established a mileage compensation plan requiring carriers to reimburse their owner operators for the fuel they use.

The mileage compensation system has been in effect since October 1981, but, according to the U.S. Fifth Circuit Court of Appeals in New Orleans, it must be eliminated by April 28. The compensation plan is the successor to the fuel surcharge program begun by the commission in 1979 to end an owner operator shutdown.

Under the mileage reimbursement plan, the ICC has published weekly a cents-per-mile figure carriers must pay their owner operators. In mid-March, compensation was fixed at 11.5¢ per mile but was expected to rise on April 1 when the new 5¢ per gallon fuel increase took effect.

"There can be no doubt that Congress has granted some truly sweeping powers to the ICC, powers that have transformed the transportation industry and removed from it the normal pricing and entry forces that run most of our economy," the court said. "But, Congress has not written a blank check to the agency, for it has admonished the commission to stay within its specifically vested powers."

The court decision will have no retroactive effect on the rate increases that were folded into the rate base when the original surcharge program ended. "Our judgment...only denies to the commission the authority to fix the compensation of owner operators as it has done by regulation Ex Parte 311, Sub 4...," the court said.

Carriers who filed suit against the compensation plan argued that it interfered with contractual labor and lease agreements. Two shipper groups also went to court because the compensation system did not distinguish between truckload and less-than-truckload reimbursement, as the fuel surcharge had done.

The court said the commission "probably had the power" to allow a surcharge for increased fuel costs, and can authorize the surcharge to be folded into the rate structure. But the commission can't order the carriers to pass the money along to the owner operator.

Jim Johnston, president of the Owner Operator Independent Drivers Association of America, said he was disappointed at the ruling but not surprised. "We're hoping the ICC will challenge the decision," he said.

Trucking industry pays high corporate taxes; railroads pay none in '81

From CCJ's Washington Bureau

The trucking industry had one of the nation's highest corporate income tax rates in 1981 while railroads paid no taxes at all, a new Senate study has revealed. The report from the Joint Committee on Taxation shows motor carriers paid $367.5 million in federal corporate income taxes on income of $796.6 million. The industry's 46.1% tax rate was second only to motor vehicle manufacturers, who paid 47.7%.

Federal Corporate Income Tax, 1981

Industry	U.S. Income Before Tax	Current U.S. Tax Expense	% U.S. Tax on U.S. Income
Aerospace	$2,282,317	$ 155,291	6.8
Beverages	1,186,983	342,251	28.8
Chemicals	3,116,500	154,300	5.0
Commercial banks	2,050,168	47,975	2.3
Crude oil production	996,075	31,043	3.1
Diversified financials	1,653,911	277,816	16.8
Diversified services	1,714,074	507,179	29.6
Electronics, appliances	4,551,281	1,335,269	29.3
Food processors	2,809,725	752,603	26.8
Industrial and farm equipment	1,594,768	383,574	24.1
Metal manufacturing	2,557,389	249,680	9.8
Motor vehicles	1,188,694	566,704	47.7
Office equipment	4,327,124	1,093,007	25.3
Oil and refining	21,489,584	4,003,997	18.6
Paper and wood products	1,354,143	(192,877)	(14.2)
Pharmaceuticals	1,692,049	606,782	35.9
Retailing	2,365,877	536,268	22.7
Tobacco	2,593,421	811,881	31.3
Transportation:			
Airlines	239,571	38,533	16.1
Railroads	1,723,273	(129,434)	(7.5)
TRUCKING	796,654	367,550	46.1
Utilities	15,375,821	1,417,224	9.2

(Dollar amounts in thousands)

Railroads earned $1.7 billion in 1981 but paid no taxes. Instead, because of special exemptions and tax rules, railroads will actually receive a refund or future tax credit from the federal government of $129.4 million. The industry had a tax rate of 7.5%.

According to the study, an industry's "effective tax rate" is simply the income tax it owes in a certain year divided by its income for that year. Corporations are required by law to reconcile any differences between their effective tax rate and the maximum statutory corporate tax rate of 46%.

If all accounting rules and principles were the same and there were no tax credits, all corporations would have an effective tax rate identical to the 45% statutory level. Exemptions, however, cause wide discrepancies.

A negative effective tax rate occurs when there is a book income but a tax loss for the year. The tax loss results in a refund of past taxes or credit towards future taxes.

SIZES AND WEIGHTS 1983

THE STATES ARE STILL IN CONTROL

The new federal size and weight limits for trucks directly affect traffic on something less than 700,000 miles of Interstate and federal highways. The states, on the other hand, control more than three million miles of other roads. The states, then, have the power to make the STA Act a momentous productivity boost for truckers or a Pandora's box of dubious benefit to the industry.

On Jan. 6, the Surface Transportation Assistance Act of 1982 was signed into law by President Reagan. The Interstate highway system, theoretically, was opened up to larger, heavier truck traffic. But fleetmen should realize that the states will have a major impact on how widespread the use of the larger rigs becomes.

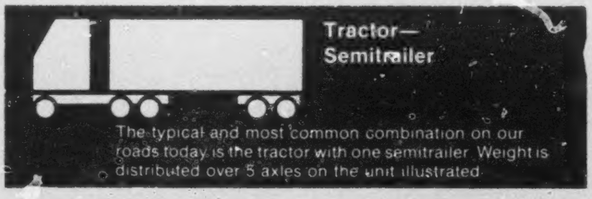
The federal government can require the larger rigs on the Interstates, but it has no control over state roads and the three million miles of non-federal aid highways. And the feds are allowing the states ample leeway to designate which of their highways and roads will carry the larger rigs.

Arkansas, for example, one of three previous "barrier" states has already enacted legislation that allows larger rigs on most of its primary and secondary roads. These changes are indicated in the following size and weight tables. Several others, such as Illinois, Missouri and New Jersey, are working on similar legislative changes, but until the changes are law, we cannot include them in our tables.

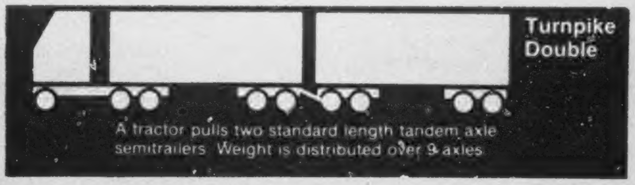
The states will continue to have authority to approve special use permits. They are also required to provide reasonable access to Interstates and other designated highways. Each state has a lot of flexibility to do so as long as its actions or restrictions do not inhibit the intent of the law or impede the flow of commerce.

The problem for 1983—and each fleet is facing this to some extent—is that until those states which have to change their laws to comply with the STA Act do so, one knows what the final accessible highway system will be. Each state was to submit to DOT by March 15 a preliminary list of roads on which it will permit the larger rigs to roll. DOT is scheduled to issue a list of these roads in September.

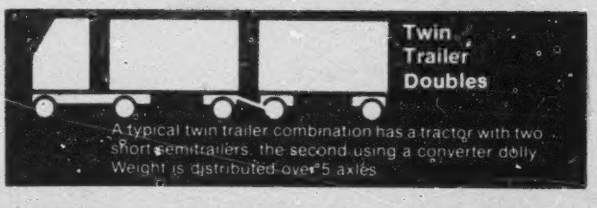
Read on for a list of the most up-to-date size and weight limits, by state, along with major amplifications or exceptions for each state. In addition to Arkansas, the states of Connecticut, Florida, Idaho, Iowa, Kentucky, Louisiana, Montana and Vermont have changed their length or weight restrictions; other states have changed their exceptions or permit rules.



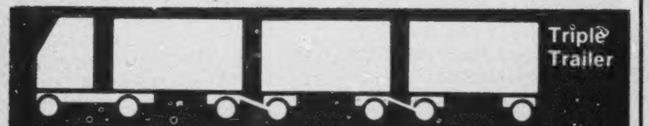
The typical and most common combination on our roads today is the tractor with one semitrailer. Weight is distributed over 5 axles on the unit illustrated.



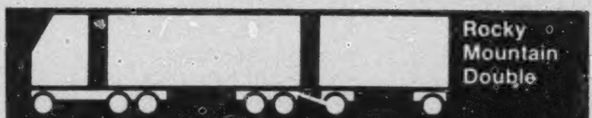
A tractor pulls two standard length tandem axle semitrailers. Weight is distributed over 9 axles.



A typical twin trailer combination has a tractor with two short semitrailers, the second using a converter dolly. Weight is distributed over 5 axles.



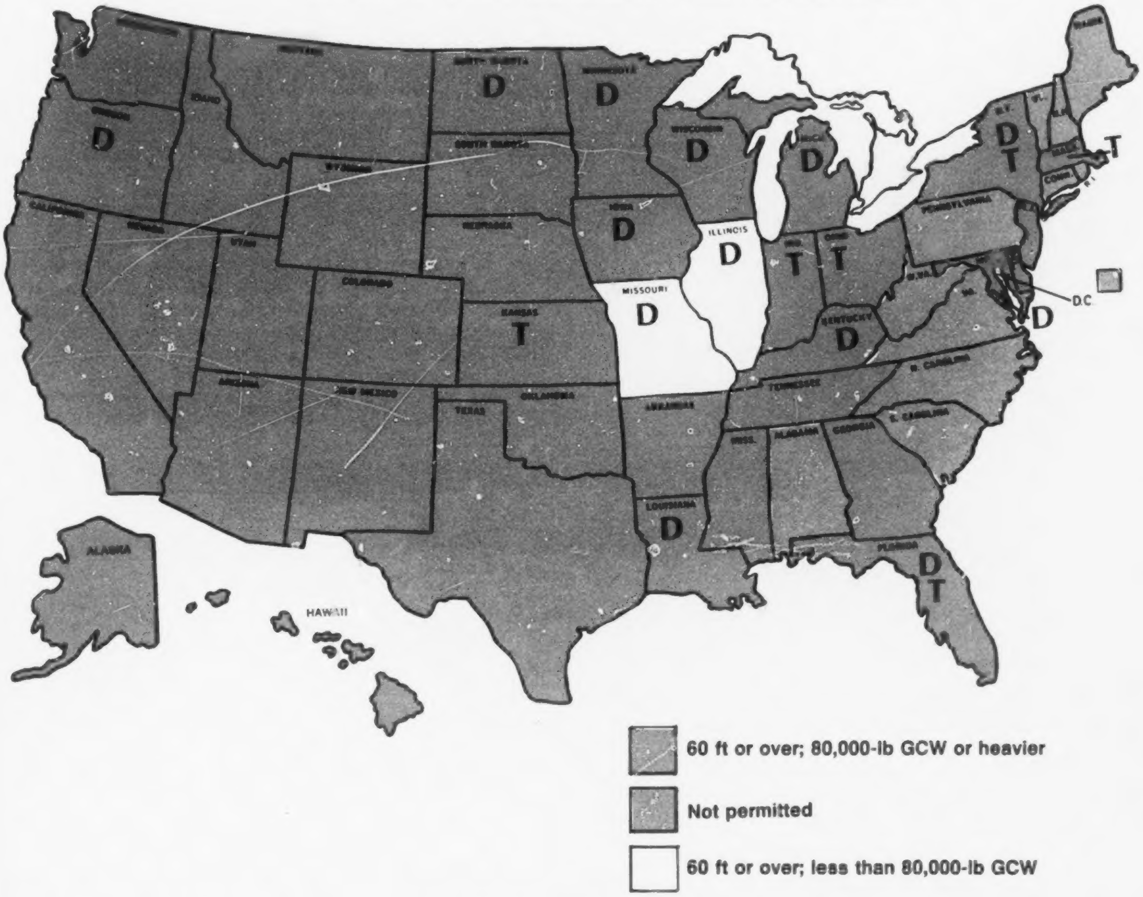
A tractor pulls three short semitrailers, the two rear with converter dollies. Weight is distributed over 7 axles.



A tractor pulls a standard length semitrailer plus a shorter second trailer. Weight is distributed over 7 or 8 axles.

BASIC TRUCK CONFIGURATIONS

WHERE 5-AXLE DOUBLES ARE PERMITTED


OREGON D
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ILLINOIS D
MISSOURI D
IND. T
OHIO T
KANSAS T
KENTUCKY D
D.C.
D
LOUISIANA D
FLORIDA D T
HAWAII
60 ft or over; 80,000-lb GCW or heavier
Not permitted
60 ft or over; less than 80,000-lb GCW

State prohibitions on the use of twin trailer (double bottom) combinations may be coming to a close, but not for awhile yet. The Surface Transportation Assistance Act of 1982 prohibited states from banning double bottom rigs on their highways beginning April 6. But that is effective only for the interstate and controlled access, four-lane highways.

Prior to passage of the STA Act, 12 states and the District of Columbia prohibited double bottoms on their roads. Three states (Arkansas, Illinois and Missouri) allowed them but at less than 80,000 lb and only on designated highways (Illinois and Missouri). New Jersey had a 55-ft overall length limit. State legislatures have until October to change their laws and allow the larger rigs. If they have not done so by then, the federal Department of Transportation will consider taking action against them either by withholding federal highway funds or injunctive relief. Even so, the states will still have a certain degree of leeway in designating what other state roads will accept the doubles.

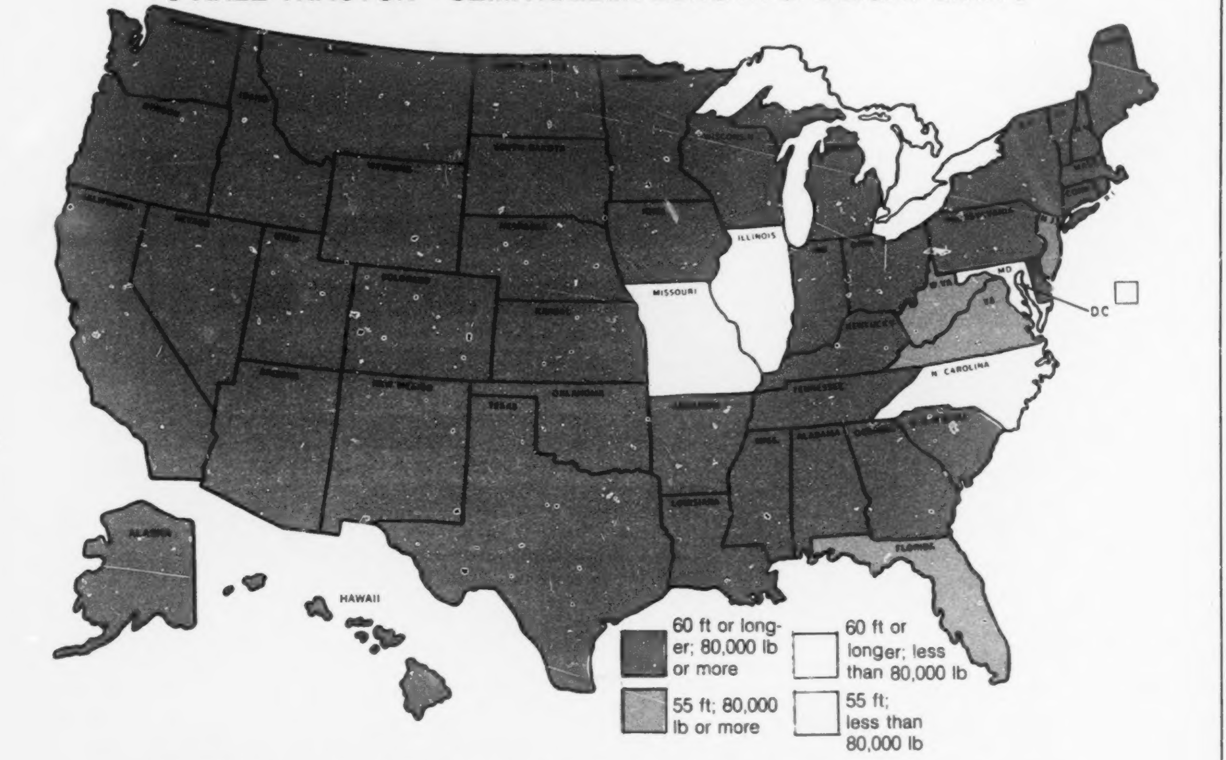
Also, the states may not set overall length limits on twins combinations. They may, instead, set trailer length limits but no shorter than 28 ft for twins (48-ft for semi-trailers). This means that there will be no more 55-ft overall length limits.

As of press time, only Arkansas had passed the required legislation. All of the states are expected to change their laws this year, but it is impossible to predict what they will do at this time. For now, although double bottom rigs may operate on Interstate highways nationwide, they are still prohibited from operating off the Interstates in those states listed above.

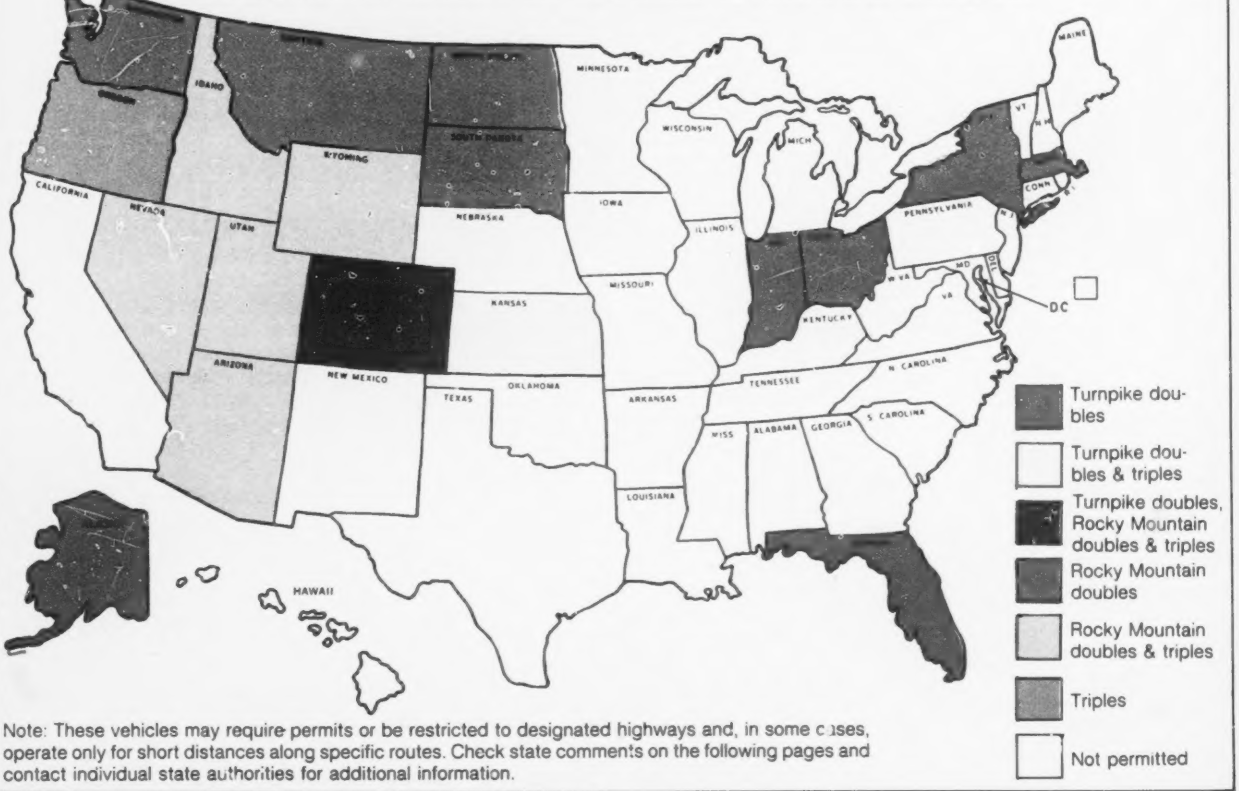
Abbreviations and Definitions

● —See state comments
NS —Not specified
NP —Not permitted
D —Designated highways only
P —Permit required
T —65-ft lengths or longer permitted on turnpikes and toll roads
Stinger-Steered—a combination where the coupling devise is located to the rear of the last axle of the towing vehicle

5-AXLE TRACTOR—SEMITRAILER LENGTH & WEIGHT LIMITS


ILLINOIS
MISSOURI
MD
DC
VA
W VA
KENTUCKY
TENNESSEE
N CAROLINA
HAWAII
60 ft or longer; 80,000 lb or more
60 ft or longer; less than 80,000 lb
55 ft; 80,000 lb or more
55 ft; less than 80,000 lb

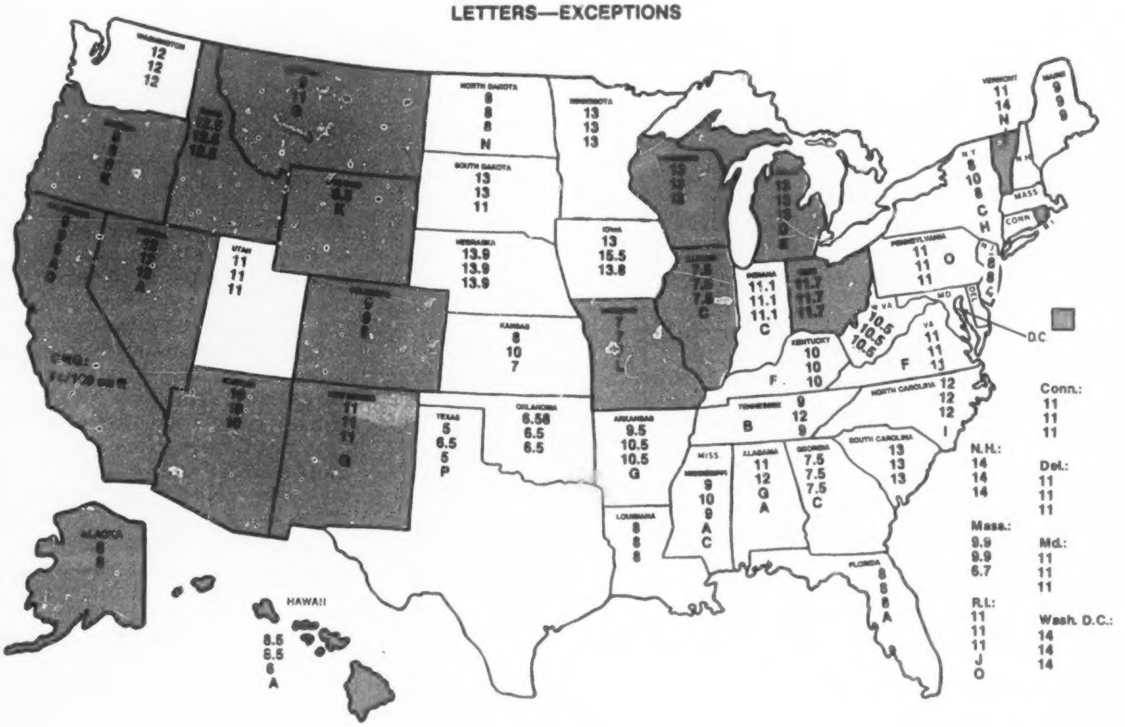
TRIPLES, ROCKY MOUNTAIN DOUBLES & TURNPIKE DOUBLES


MINNESOTA
MAINE
IDAHO
WISCONSIN
MICH
VT
NH
WYOMING
SOUTH DAKOTA
CALIFORNIA
NEVADA
UTAH
NEBRASKA
IOWA
ILLINOIS
PENNSYLVANIA
CONN
NJ
MD
DEL
W VA
VA
MISSOURI
KANSAS
KENTUCKY
DC
ARIZONA
NEW MEXICO
OKLAHOMA
TEXAS
ARKANSAS
TENNESSEE
N CAROLINA
MISS
ALABAMA
GEORGIA
S CAROLINA
LOUISIANA
HAWAII
Turnpike doubles
Turnpike doubles & triples
Turnpike doubles, Rocky Mountain doubles & triples
Rocky Mountain doubles
Rocky Mountain doubles & triples
Triples
Not permitted

Note: These vehicles may require permits or be restricted to designated highways and, in some cases, operate only for short distances along specific routes. Check state comments on the following pages and contact individual state authorities for additional information.

FUEL TAXES IN CENTS-PER-GALLON

GASOLINE
DIESEL
LPG
LETTERS—EXCEPTIONS


WASHINGTON 12 12 12
12.5 12.5 12.5
12 12 12 A
UTAH 11 11 11
CNG:
NORTH DAKOTA 8 8 8 N
SOUTH DAKOTA 13 13 11
MINNESOTA 13 13 13
NEBRASKA 13.9 13.9 13.9
IOWA 13 15.5 13.8
KANSAS 8 10 7
TEXAS 5 6.5 5 P
OKLAHOMA 6.58 6.5 6.5
ARKANSAS 9.5 10.5 10.5 G
LOUISIANA 8 8 8
MISS
MISSISSIPPI 9 10 9 A C
ALABAMA 11 12 G A
GEORGIA 7.5 7.5 7.5 C
FLORIDA 8 8 8 A
SOUTH CAROLINA 13 13 13
NORTH CAROLINA 12 12 12 I
TENNESSEE 9 12 9 B
KENTUCKY 10 10 10 F
INDIANA 11.1 11.1 11.1 C
7.5 7.5 7.5 C
11.7 11.7 11.7
7 7 7 L
W VA 10.5 10.5 10.5
VA 11 11 11 F
PENNSYLVANIA 11 11 11 O
MD
DEL
D.C.
N J 8 8 C
N Y 8 10 8 C H
VERMONT 11 14 N
MAINE 9 9 9
N H
MASS
CONN
R I
ALASKA
HAWAII 8.5 6.5 6 A
Conn.: 11 11 11
N.H.: 14 14 14
Del.: 11 11 11
Mass.: 9.9 9.9 6.7
Md.: 11 11 11
R.I.: 11 11 11 J O
Wash. D.C.: 14 14 14

☐ Fuel tax reports required

▨ No fuel tax reporting laws

■ Fuel tax reporting only on special fuel (not gasoline)

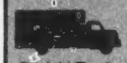
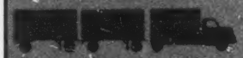
In addition to the federal tax of four cents per gallon, some local governments also impose a fuel tax. Some states have higher registration fees or mileage taxes in lieu of regular fuel tax. For fuel purchased in one state but used in another, fuel use taxes may apply and credit is often given for taxes paid in this manner. See reciprocity section for details.

Buses: Seventeen states have special provisions for buses. Tennessee, for example, excludes buses from the motor carrier fuel tax liability while Connecticut domiciled bus companies are 50% exempt in Connecticut. Other special provisions serve to exclude the operations of small vehicles from the tax base. Ten states exempt buses with fewer than nine seats. There are other examples. Since these provisions are subject to periodic revision, contact the appropriate state office for the most current information.

Key To Exceptions

A-city and/or county taxes additional
B-1¢ per gallon inspection fee additional
C-sales tax additional
D-diesel fuel sales tax additional
E-except for 100/plus passenger, regularly scheduled, in-state route buses
F-surtax on any vehicle with 3 or more axles (2% in Kentucky, 2¢ in Virginia)
G-LPG fueled vehicles may pay an annual flat rate
H-some refunds for taxicabs and buses
I-city transit buses refunded 8¢ per gallon
J-gasoline powered city buses are exempt
K-vehicles (except gasoline) subject to mileage tax are exempt from fuel tax
L-decal fee if under 18,000-lb GVW
M-based on highway miles traveled in-state
N-discounts for diesel/oil fuel mixture
O-gross receipts tax
P-decal fee

VEHICLE SIZE LIMITS

	ALABAMA	ALASKA	ARIZONA	ARKANSAS	CALIFORNIA	COLORADO	CONNECTICUT	DELAWARE	DISTRICT OF COLUMBIA	FLORIDA
Height (ft)	13½	13½	13½	13½	13½	[illegible]	13½	13½	13½	13½
Width (in.)	96	96	96	102	96	96	102	96	96	96
Length (ft)										
Bus	40	40	40	40	40	40	55	42	40	40
 Straight Truck	40	40	40	40	40	35	60	40	40	35
Trailer (Semi/Full)	NS	45	NS/40	NS	38/4J	NS	45	NS	NS	NS
Tractor-Semitrailer	60	65	65	60	60	70	60	60	55	55
Doubles	NP	70	65	65	65	70	60	65	NP	65
Truck and Trailer	NP	70	65	65	65	70	60	60	55	55
 Truck and Trailers	NP	70	NP	65	65	70	NP	NP	NP	NP
Triples	NP	NP	105	NP	NP	105	NP	NP	NP	NP
Overhang (ft)	[illegible]	[illegible]	[illegible]	[illegible]	NP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Vehicle and Combination Gross Weight Basis:

A—Gross weight controlled by *axle weight limits* up to, in most states, a specified maximum.

B—Gross weight controlled by the *Bridge Formula*.

$$W = 500\left(\frac{LN}{N-1} + 12N + 36\right)$$

where W equals the overall gross weight on any group of two or more consecutive axles to the nearest 500 lb; L is the distance in feet between the extremes of any group of two or more consecutive axles; N equals the number of axles in the group under consideration; except that two consecutive sets of tandem axles may carry a gross load of 34,000 lb each, provided the overall distance between the first and last axles of such consecutive sets of axles is 36 ft or more.

T—Gross weight controlled by a *table of axle spacing* that specifies weight permitted on a set of two or more axles and varies with the distance in feet between them.

V—Gross weight is controlled by maximum weight limits set for *specific vehicle types*.

STATE COMMENTS

Most states will allow oversize or overweight vehicles with a permit but will frequently restrict them to designated highways, lower speeds or reduced hours of travel (i.e., daylight only). Buses, auto transporters, mobile home haulers, agricultural and livestock rigs are usually awarded exceptions to statutory size and weight restrictions, sometimes with—and sometimes without—a permit required. Check with individual state authorities for specific information.

States that specify maximum permissible front and/or rear overhang, do so usually with the requirement that the overall length of the vehicle or combination—including the overhang—does not exceed the maximum allowable length for the vehicle type in question. Exceptions are noted in the comments for the states in which they occur.

While every reasonable effort was made to assure the accuracy of the information contained in this guide and numerous sources were used, including direct queries to each state, the changing nature of state size and weight regulations is such that CCJ cannot be responsible for omissions or changes in the data offered. Check with the proper state authorities (listed in the reciprocity section of this guide) for the most current information.

ALABAMA
Width—Vehicles hauling heavy forest products or culvert pipe permitted 102-in. except on interstate highways.

Weight—Maximum gross weight practicable on state roads is 84,000 lb with six axle combinations, not including tolerance. **Axles**—40,000-lb tandems allowed on state roads. **Tolerance**—10% on axle and gross weights for state roads; interstate highway limits include all tolerances.

ALASKA
Weight—Tri-axles allowed 42,000 lb with 42-in. spacing. Steering axle weight 20,000 lb or 500 lb per in. width of tires, whichever is most restrictive. **Gross weight limits for combinations:** 5 axle, 78,000 lb; 6 axle, 86,000 lb; 7 axle, 94,000 lb; 8 axle, 100,000 lb. **Tolerance**—No statutory tolerance.

VEHICLE WEIGHT LIMITS

		ALABAMA	ALASKA	ARIZONA	ARKANSAS	CALIFORNIA	COLORADO	CONNECTICUT	DELAWARE	DISTRICT OF COLUMBIA	FLORIDA
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Steering Axle (1000 lb)		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Single Axle (1000 lb)		20	[illegible]	20	20	20	20	22.4	20	22	22
Tandem Axles (1000 lb)		34	34	34	34	34	36	36	40	38	44
Min. Axle Spacing (in.)		40+	42+	40+	40+	NS	40+	NS	48+	40+	40+
Maximum Gross Practicable	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	[illegible] Axle Single Unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	72	[illegible]	[illegible]
	[illegible] Axle Tractor, 1 Axle Trailer	52	52	52	48	52	52	60	52	56	[illegible]
	2 Axle Tractor, 2 Axle Trailer	66	66	66	62	66	72	73	70	70	66.6
Maximum Gross	3 Axle Tractor, 2 Axle Trailer	80	92	80	73.2	80	80	80	80	79	80
	Doubles	NP	92	80	73.2	80	80	NP	80	NP	80
	3 Axle Truck, 2 Axle Trailer	NP	92	80	73.2	80	80	NP	80	79	80
	[illegible] Combinations	NP	[illegible]	80	73.2	80	NS	NP	80	NP	80
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Long Combinations—Combinations up to 100-ft allowed on designated highways.

ARIZONA

Height—Up to 14-ft height with permit.

Weight—Auxiliary axles permitted on semitrailer but not to exceed gross weight limits, except by permit. **Tolerance**—No statutory tolerance.

Long Combinations—Triples allowed 105-ft length, 105,000 lb on designated highways with permit.

ARKANSAS

Weight—80,000 lb weight on secondary highways limited to 40-mph is posted as such. Annual permits available for 18,000-lb steering axles on special heavy-duty or construction rigs. Maximum gross weight practicable on all but interstate, primary and secondary roads (maximum speed 40 mph) is 64,000 lb. Permits for up to 108,000 lb; with 8 axles, 126,000 lb; 9 axles, 140,000 lb; 10 axles, 158,000 lb; single axles, 25,000 lb; tandem axles, 45,000 lb with no one axle of a tandem exceeding 25,000 lb. **Tolerance**—No statutory tolerance.

CALIFORNIA

Length—45-ft semitrailer if kingpin-to-rearmost axle measures 38 ft maximum. Stinger-steered tractor-semitrailer combinations allowed 65 ft when kingpin distance to rearmost axle of semitrailer does not exceed 34 ft; if longer than 34 ft, the 60-ft length limitation will apply. 135-ft combinations allowed under permit.

Width—Outside width at tires may be 100 in. Buses allowed 102-in. width. Vehicles hauling loosely piled agricultural products in bulk, 120-in. width.

Weight—Two consecutive sets of tandem axles between 25- and 33-ft apart limited to 64,000 lb. If 36-ft spread or greater, each axle may carry 34,000 lb but not to exceed 68,000 lb for the two consecutive sets. **Maximum weights allowed under permit:** 28,000-lb single; 46,200-lb tandem; maximum gross weight determined by number of axles. **Tolerance**—Weight limits include all tolerances.

COLORADO

Width—102-in. wheel width allowed measured from outside wheel and tire to opposite side. **Height**—13½ ft allowed on designated highways.

Weight—Maximum weight practicable on state roads, 85,000 lb. **Axles**—40,000-lb tandems allowed on state roads. **Tolerance**—No statutory tolerance.

Long Combinations—Triples are allowed.

CONNECTICUT

Length—48-ft semitrailer with permit as of 1/1/83. Expected to change by 10/1/83. Up to 80 ft without a permit for combinations loaded with poles, piling or struc-

VEHICLE SIZE LIMITS

	GEORGIA	HAWAII	IDAHO	ILLINOIS	INDIANA	IOWA	KANSAS	KENTUCKY	LOUISIANA	MAINE
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Width (in)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Length (ft) Bus	60	40	40	42	40	40	42½	40	40	45
Straight Truck	60	40	40	42	36	40	42½	45	40	45
Trailer (Semi/Full)	45	NS	NS	NS/42	NS	NS	NS/ 42½	NS	NS	45
Tractor-Semitrailer	60	60	65	60	60	60	65	60	65	60
Doubles	NP	65	75/105	65	65	65	65	65	65	NP
Truck and Trailer	60	60	75	60	60	65	65	60	65	60
Truck and Trailers	NP	NP	105	NP	65	NP	65	NP	65	NP
[illegible]	NP	NP	105	NP	NP	NP	105	NP	NP	[illegible]

tural units. **Overhang**—Maximum overhang under permit shall not exceed ⅓ the length of the load.

Weight—Maximum weight practicable, including tolerance, 80,000 lb; lesser weights will apply for vehicles not meeting the Bridge Formula. **Axles**—Single axles spaced less than 6-ft apart limited to 1[illegible],000 lb. **Tolerance**—2% but gross weight not to exceed 80,000 lb.

DELAWARE
Length—Pole trailers allowed 70 ft plus 6-ft rear overhang.

Tolerance—No statutory tolerance.

DISTRICT OF COLUMBIA
Weight—38,000-lb tandem axle and 22,000-lb single axle limits apply when gross vehicle weight is less than 73,000 lb; when gross weight is heavier than 73,000 lb, tandems are limited to 34,000 lb, and single axles are limited to 20,000 lb. **The maximum axle weight limit under permit is:** 31,000 lb single; 62,000 lb tandem. Gross weight maximums are not specified but vehicle not to exceed manufacturer's rated load capacity. **Tolerance**—1000 lb is added to the legal limit for gross loads and under permit.

FLORIDA
Length—Straight trucks over 35 ft must have three axles. Full trailers allowed 40 ft with three axles. 65-ft tractor-semitrailer allowed with permit. Doubles restricted to rural interstate highways and multilane divided highways. Urban areas of the interstate, such as Ft. Lauderdale, Tampa and Miami, are excluded.

Weight—550 lb per in. width of tire applies only for special vehicles such as dump trucks, concrete mixers, fuel and gasoline trucks. Maximum gross weight on 5 axles is 100,000 lb with blanket permit. **Tolerance**—10% allowed on scaled weight for enforcement purposes, but no tolerance on maximum gross weight.

Sunshine State Parkway/Long Combinations—Doubles allowed up to 110-ft length, 138,217 lb on Sunshine State Parkway.

GEORGIA
Length—Trailers up to 48-ft allowed with 55-ft overall length as of 2/1/83. **Height**—14½ ft allowed under annual permit. **Overhang**—No statutory overhang limits provided legal length is not exceeded, but administrative policy directs overhang be limited to 10 ft.
Weight—Axle weight limits include working tolerance. Maximum axle limit under permit is 25,000 lb, 35,000 tandems on combinations longer than 55 ft. Maximum gross weight is limited to 56,000 lb on secondary roads unless vehicle is making pickup or delivery. **Tolerance**—No statutory tolerance, but working tolerance is 13%.

HAWAII
Length—65-ft tractor-semitrailer allowed with 45-ft semitrailer for agricultural trucks. **Overhang**—There are no statutory overhang limits except that any front overhang must be at least seven feet above the roadway, and legal length maximums may not be exceeded.

Weight—Gross weight formula for all but interstate highways is: W = 880 (L+40); where W = maxi-

VEHICLE WEIGHT LIMITS

		GEORGIA	HAWAII	IDAHO	ILLINOIS	INDIANA	IOWA	KANSAS	KENTUCKY	LOUISIANA	MAINE
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	Single Axle (1000 lb)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	Tandem Axles (1000 lb)	40.6	34	34	32	34	34	34	34	37	34
	Min. Axle Spacing (in.)	40+	42+	48+	40+	40+	40+	40+	42+	40+	48
Maximum Gross Practicable	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	3 Axle Single Unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	2 Axle Tractor, 1 Axle Trailer	52.6	60	52	48	60	60	52	52	52	56
	2 Axle Tractor, 2 Axle Trailer	72.9	66	66	62	62	74	66	66	66	66
Maximum Gross	3 Axle Truck, 2 Axle Trailer	80	80.8	80	73.2	80	80	80	80	83.4	80
	Doubles	80	80.8	85.5	73.2	80	80	80	80	83.4	NP
	3 Axle Tractor, 2 Axle Trailer	80	80.8	85.5	73.2	80	80	80	80	83.4	NP
	Other Combinations	80	80.8	[illegible]	73.2	NP	80	[illegible]	80	NS	NP
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

mum weight in pounds rounded to nearest 500 lb; L = distance in feet between first and last axles of combination. 88,880-lb gross weight allowed under permit. **Tire loads**—Limited by the formula: 60 x 1.5708 W^2, where W = the loaded tire tread width. **Tolerance**—No statutory tolerance.

IDAHO
Width—102 in. allowed on state primary and secondary highway systems.

Weight-Load per in. tire width—Applies where tires are wider than 5 in. **Maximum weights allowed under permit**—Single axles, 25,000 lb; tandem, 50,000 lb; no gross weight specified. 105,500 lb allowed on designated highways. **Tolerance**--No statutory tolerance.

Long Combinations—Doubles and triples allowed up to 105-ft length, 105,500-lb gross weight under permit.

ILLINOIS
Length—Stinger-steered tractor-semitrailers and doubles with 65-ft length allowed on 4-lane and some designated highways. Maximum practicable length permit 145 ft.

Weight—One axle of a tandem assembly may carry up to 18,000 lb, but overall tandem weight not to exceed 32,000 lb. **Tolerance**—2000 lb.

INDIANA
Weight—Maximum under permit on interstate highways: Gross, 108,000 lb; single axle, 28,000 lb; tandems, 24,000 lb per axle; triaxle group, 17,000 lb per axle (but not to exceed 800 lb per in. tire width). On designated "Heavy Duty" highways, single axles are permitted 22,400 lb; tandems, 36,000 lb (but not to exceed maximum gross weight limitation). **Tolerance**—No statutory tolerance, however, overloads of 1000 lb or less will not be penalized.

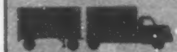
Indiana Turnpike—Special size and weight maximums are in effect that do not require permits: 65-ft combinations may gross 90,000 lb; 36,000-lb tandems; 22,400-lb single axles. Annual permits available for lengths up to 108 ft, 12-ft. width permitted (10 ft after dark); 14½-ft height. **Under tandem trailer permits:** Tractors hauling doubles at 76,800 lb and heavier must have more than one drive axle.

IOWA
Length--Three axles required on buses longer than 35 ft. For trailers, 40 ft between kingpin and center of rear axle. 65 ft doubles on designated highways.

Weight—Tandem axles spaced less than 40-in. apart are considered as one axle. Other axle configurations must comply with bridge formula. **Tolerance**—5% tolerance but not to exceed 80,000 lb.

Long Combinations—Under doubles permits, 108-ft length must have at least 5 axles (9 axles maximum); gross weight up to 127,400 lb.

VEHICLE SIZE LIMITS

	MARYLAND	MASSACHUSETTS	MICHIGAN	MINNESOTA	MISSISSIPPI	MISSOURI	MONTANA	NEBRASKA	NEVADA	NEW HAMPSHIRE
Height (ft)	13½	13½	13½	13½	13½	13½	13½	14½	[illegible]	13½
Width (in.)	96	96	96	96	96	96	102	96	96	96
Length (ft) Bus	55	40	40	40	40	40	40	40	40	40
 Straight Truck	40	35	40	40	35	40	40	40	40	35
 Trailer (Semi/Full)	NS	45/33	48	45	NS	NS	NS	NS/40	NS	45
 Tractor-Semitrailer	55	60	60	60	60	55	65	65	70	60
 Doubles	65	NS	65	65	60	65	65	65	70	NP
 Truck and Trailer	55	NP	65	60	60	65	65	65	70	60
 Truck and Trailers	NP	NP	65	NP	NP	65	NP	65	70	NP
 Triples	NP	NP	NP	NP	NP	NP	NP	NP	105	NP
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

KANSAS
Length—65-ft doubles limited to state highways only. **Width**—102 in. allowed if measured across tires.

Weight—85,500-lb maximum weight practicable on all non-interstate highways. **Tolerance**—No statutory tolerance.

Kansas Turnpike/Long Combinations—Triples and turnpike doubles allowed 105-ft length, 130,000 lb with permit on Kansas Turnpike.

KENTUCKY
Length—Figures shown are for AAA highways only; lower limits may apply elsewhere. Doubles may operate only on interstate highways or designated highways.

Height—11½ ft, some roads; 13½ ft on Class A and B roads. **Weight**—Maximum weight practicable listed applies to AAA highways; Class AA highways limited to 62,000 lb; Class A highways limited to 44,000 lb. * **Steering axle**—Weight according to tire width. **Load per in. width**—of tire is 600 lb per in. of the aggregate width of all the tires on a single axle. **Axles**—Triaxles allowed 50,000 lb with 42-in. spread, but less than 120-in. spread. 21,000-lb single axles, 35,700-lb tandems and 82,000-lb gross weights are allowed on some highways. **Maximum weights allowed under permit:** 24,000-lb single; 48,000-lb tandems (42-in. spacing); 96,000-lb 5-axle combinations; 120,000-lb 6-axle combinations. **Tolerance**—No statutory tolerance.

LOUISIANA
Length—Combinations with forest products, 80 ft; poles and piling, 75 ft. Bus length includes bumpers. Doubles allowed on 4-lane highways plus a 10-mile radius.

Weight—Higher axle weights apply on non-interstate highways: 22,000-lb single; 37,000-lb tandem; 45,000-lb triaxle; 53,000-lb quadrum axles. **Steering axle**—Weights up to 22,000 lb on non-interstate highways, dependent on tire size. **Tolerance**—No statutory tolerance, but single axle variations of 2000 lb and 3000 lb on tandem, tri and quadrum axles are permitted; but not to exceed gross weight limitations.

MAINE
Width—Limit on interstate is 102 in.

Weight—Tandems allowed 38,000 lb on non-interstate highways (22,000-lb limit on any one axle of a tandem). 48,000 lb permitted on triaxles spaced more than 48 in. apart. **Steering axle**—22,000 lb or 600 lb per in. tire width. **Tolerance**—No statutory tolerance, but state has a 2000-lb *prima facie* law and intent to overload must be proven before penalty is levied. Applicable for axle, gross and registered weights.

MARYLAND
Size—There are no set maximums for length, width or height movements under permit. Doubles restricted to interstates and designated highways only.

Weight—Combinations with GCW 73,000 lb or less: Axle weights are 22,400-lb single; 36,000-lb tandem. **Combinations with GCW heavier than 73,000 lb:** Axle weights are 20,000-lb single; 34,000-lb tandem. **Single units**—With tandem axle spacing less

VEHICLE WEIGHT LIMITS

		MARYLAND	MASSACHUSETTS	MICHIGAN	MINNESOTA	MISSISSIPPI	MISSOURI	MONTANA	NEBRASKA	NEVADA	NEW HAMPSHIRE
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	Single Axle (1000 lb)	22.4	22.4	20	20	18	18	20	20	20	[illegible]
	Tandem Axles (1000 lb)	40	36	32	34	34	32	34	34	34	36
	Min. Axle Spacing (in.)	48	NS	42	40+	40+	40+	40+	40+	40+	NS
Maximum Gross Practicable	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	[illegible] Axle Single Unit	55	65	[illegible]	56.5	[illegible]	55.4	54	[illegible]	[illegible]	[illegible]
	2 Axle Tractor, 1 Axle Trailer	55	56.8	46	52	46	50	50	52	52	52.8
	2 Axle Tractor, 2 Axle Trailer	65	70.4	62	66	60	66	[illegible]	66	66	66.4
Maximum Gross	3 Axle Tractor, 2 Axle Trailer	79	80	80	80	80	73.2	80	86.5	80	80
	Doubles	79	80	84	80	80	73.2	80	80	80	NP
	3 Axle Truck, 2 Axle Trailer	79	80	80	80	80	73.2	80	80	80	NP
	Other Combinations	79	80	136	80	80	73.2	80	[illegible]	80	NP
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

than 48 in., limited to 36,000 lb. **Steering axle**—Single units limited to 20,000 lb with GVW heavier than 73,000 lb. Combinations limited by tire size. **Tolerance**—1000 lb.

MASSACHUSETTS
Width—Outside width at tires may be 102 in.

Height—14 ft with permit.

Weight—3-axle units allowed 73,000 lb, 4-axle units allowed 87,000 lb and 5-axle units allowed 99,000 lb with permits. **Single unit**—(Construction and oil vehicles registered in Mass.) 2-axle unit, 46,000 lb; 3-axle, 60,000 lb. **Axles**—tandems spaced less than 6 ft apart limited to 18,000 lb per axle. **Tolerance**—No statutory tolerance.

Massachusetts Turnpike/Long Combinations—Doubles allowed 108 ft and 127,400 lb.

MICHIGAN
Length—65-ft combinations on interstates and designated highways only. 59-ft other roads. 60-ft tractor-semitrailer combinations with maximum semitrailer length of 48 ft.

Width—Lateral projection of pneumatic tires may be 102 in. Vehicles hauling forest products, agricultural products, or concrete pipe, allowed 108 in. for load only.

Weight—No more than one 32,000 lb tandem allowed on combinations, except for the two permitted on 5-axle tractor-semitrailer combination, if GCW does not exceed 73,280. **Axles**—34,000 lb tandem axles limited to 17,000 lb on any one axle and permitted on interstates and designated highways only, otherwise tandem axle limit is 26,000 lb with 13,000 lb on any one axle. **Michigan Special**—(Michigan Train) 163,000-lb doubles combination on 11 axles (maximum number allowed). **Tolerance**—No statutory tolerance.

MINNESOTA
Length—65-ft combinations allowed on designated highways with permit.

Weight—Maximum weight practicable on non-interstate and designated highways is 73,280 lb. **Axles**—axle weights shown are for interstate and designated highways; on other roads limits are 18,000-lb single, 32,000 lb tandem. **Maximum gross weight under permit:** 5-axles, 84,000 lb; 6-axles, 96,000 lb; 7-axle (tridem/tridem) is 108,000 lb. **Tolerance**—All weight limits include enforcement tolerances.

MISSISSIPPI
Weight—Tandem axle, vehicle and combination gross weights shown are for interstates and designated highways only. Permit required for all vehicles exceeding 57,650 lb on State Roads and 73,280 lb designated highways. **Axles**—weight limit specified not to exceed 550 lb per in. tire width. **Tolerance**—5% tolerance allowed on non-interstate highways for single and tandem axles (not to exceed 500 lbs).

MISSOURI
Size—108-in. width and 15-ft

VEHICLE SIZE LIMITS

	New Jersey	New Mexico	New York	North Carolina	North Dakota	Ohio	Oklahoma	Oregon	Pennsylvania	Rhode Island
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Width (in.)	96	96	96	96	102	96	96	96	96	102
Length (ft)										
Bus	[illegible]	40	40	40	40	40	45	40	40	40
Straight Truck	35	40	35	35	40	40	40	40	40	40
Trailer (Semi/Full)	NS/35	NS	45	45	NS	NS	NS	NS	NS	NS/40
Tractor-Semitrailer	55	65	60	55	75	60	65	60	60	60
Doubles	55	65	65	NP	75	65	65	75	NP	NP
Truck and Trailer	55	65	60	55	75	65	65	75	60	60
Truck and Trailers	55	NP	65	NP	75	65	NP	75	NP	NP
Triples	NP	105	NP	NP	NP	NP	NP	105	NP	NP
Overhang (ft)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

height allowed within and up to two miles outside of cities with populations of 75,000 or more. **Length**—65-ft doubles permitted on primary state roads and interstate highways, plus 5 miles. **Width**—Buses allowed 102 in. on designated highways. **Overhang**—No statutory limits, but not to exceed legal length limits.

Weight—Under permit a 5-axle combination with 43-ft wheelbase or longer is allowed the following: GCW 92,000 lb, 20,000-single axles, 40,000-lb tandems (with not more than 21,000 lb on any one axle). **Buses**—Allowed 20,000-lb single axles; 34,000-lb tandems. **Axles**—22,000-lb single axles allowed within and up to two miles from cities with populations of 75,000 or more. **Tolerance**—No statutory tolerance.

MONTANA
Overhang—No statutory overhang, but vehicle length not to exceed legal length limitations.

Weight—In compliance with the bridge formula, the maximum allowable weight on any group of axles under permit is: 2 axles, 40,000 lb; 3 axles, 60,000 lb; 4 axles, 80,000 lb; 5 axles, 85,500 lb; 6 axles, 90,000 lb; 7 axles, 95,000 lb; 8 axles, 100,280 lb; 9 axles, 105,500 lb. **Axles**—Weight limitations shown on chart not to exceed 600 lb per in. tire width restriction. **Tolerance**—No statutory tolerance.

Long Combinations—Rocky Mountain doubles permitted 85-ft length and 105,500 lb on designated highways with permit.

NEBRASKA
Overhang—Shall not exceed the distance from the rear axle of the hauled motor vehicle to the closest bumper.

Weight—Maximum weight practicable on state roads is 95,000 lb with 7 axles and permit. 5-axle doubles allowed 86,500 lb with permit. **Tolerance**—No statutory tolerance.

NEVADA
Width—102 in. on state roads with permit. **Overhang**—No statutory overhang, but 10 ft is allowed provided total length of vehicle including overhang does not exceed specified maximums. **Tolerance**—No statutory tolerance.

Long Combinations—Triples and Rocky Mountain Doubles allowed 105-ft length, and up to 129,000-lb GCW with 9 axles and 101-ft wheelbase. Permit required.

NEW HAMPSHIRE
Weight—Practicable gross weights shown for 3- and 4-axle single units are maximums for interstate highways and require two driving rear axles. On state roads these vehicles are allowed 55,000 lb, and 60,000-lb maximum gross weight practicable, respectively. 3- and 4-axle single units with only one driving axle are limited to 40,000-lb gross weight. **Tolerance**—No statutory tolerance.

NEW JERSEY
Weight—For operations on other than interstate highways gross weight is limited only by the axle limitations with an overall maximum gross weight limitation of 80,000 lb. **Tolerance**—5% on axle and gross weights, but not to exceed maximum gross weight limitation.

New Jersey Garden State Parkway—Trucks not permitted north of Interchange 97A.

VEHICLE WEIGHT LIMITS

		NEW JERSEY	NEW MEXICO	NEW YORK	NORTH CAROLINA	NORTH DAKOTA	OHIO	OKLAHOMA	OREGON	PENNSYLVANIA	RHODE ISLAND
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Single Axle (1000 lb)		22.4	[illegible]	22.4	19	20	20	20	20	22.4	22.4
Tandem Axles (1000 lb)		34	34.3	36	36	34	34	34	34	36	36
Min. Axle Spacing (in.)		40	43	46	48+	40+	48+	40+	40+	NS	40+
Maximum Gross Practicable	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	[illegible] Single Unit	46	[illegible]	46	[illegible]	46	46	46	46	46	44
	4 Axle Single Unit	56.6	58.5	59	67.2	58.5	60	64.5	56.2	55	44
	2 Axle Tractor, 1 Axle Trailer	56.8	55.2	56.8	40.8	51	52	52	51	56.8	56.8
	2 Axle Tractor, 2 Axle Trailer	68.4	67.9	70.4	67.2	65	66	66	65	73.2	67.4
Maximum Gross	3 Axle Tractor, 2 Axle Trailer	80	86.4	80	79.8	80	80	85.5	80	80	80
	Doubles	80	86.4	80	NP	80	80	85.5	80	NP	NP
	3 Axle Truck, 2 Axle Trailer	80	86.4	80	79.8	80	80	85.5	80	80	80
	Other Combinations	80	86.4	80	NP	80	80	80	80	NP	80
[illegible] Computation		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

NEW MEXICO

Width—Outside tire width may be 102 in. but vehicle width limited to 96 in., except on interstates and designated highways where 102 in. vehicle width is permitted. **Overhang**—Annual permits for 3-ft front, 7-ft rear overhang for vehicles or combinations up to 80-ft overall length. **Tolerance**—No statutory tolerance.

Long Combinations—Doubles and triples allowed on designated highways with permit.

NEW YORK

Length—48-ft trailers and semitrailers allowed provided overall length does not exceed 55 ft.

Weight—2-axle single units 36,000 lb with less than 10-ft wheelbase. Special formula for 3 or more axles. **Tolerance**—No statutory tolerance.

New York State Thruway—Turnpike Doubles permitted up to 108 ft and 120,400 lb. Three axle tractor with two drive axles required for GVW of 110,000 lb or heavier.

NORTH CAROLINA

Length—Single units with 3 axles allowed 40 ft. **Weight**—5-axle vehicles or combinations heavier than 73,000 lb limited to 35,700 lb tandems; if lighter than 73,000 lb, tandems may be 38,000 lb. **Tolerance**—1000 lb on axle weights included in legal limits.

NORTH DAKOTA

Length—All state roads have been designated for the 75-ft length limit.

Weight—Maximum weight practicable on interstate highways and non-designated highways is 80,000 lb; on designated highways, 105,500 lb. No set limit elsewhere under permit. Seasonal axle weight reductions specified during Spring. **Steering Axle**—Not to exceed 550 lb per in. tire. **Tolerance**—No statutory tolerance.

OHIO

Size—Urban buses permitted 48-ft length and 104-in. width.

Weight—Maximum weight practicable 80,000 lb (38,000 lb, plus 900 lb per foot of wheelbase). **Axle**—tandems allowed 1000 lb additional weight per foot (or fraction thereof) over 48-in. spacing up to a maximum of 40,000 lb. **Steering Axle**—Subject to maximum of 20,000 lb. **Tolerance**—No statutory tolerance.

Ohio Turnpike/Long Combinations—21,900-lb single axles, 32,000 lb tandems with 90,000-lb GVW on turnpike. Doubles allowed up to 106 ft and 127,400 on turnpike.

OKLAHOMA

Weight—Gross weight limited to 80,000 lb on interstate highways; 90,000 lb state roads, or 20,000 lbs maximum per axle with permit. **Tolerance**—No statutory tolerance, but vehicles may carry more than 2000 lb more than registered or licensed weight.

OREGON

Length—48-ft semitrailer of kingpin-to-rearmost axle distance is

VEHICLE SIZE LIMITS

	SOUTH CAROLINA	SOUTH DAKOTA	TENNESSEE	TEXAS	UTAH	VERMONT	VIRGINIA	WASHINGTON	WEST VIRGINIA	WISCONSIN	WYOMING
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Width (in.)	96	96	96	96	96	102	96	96	96	96	96
Length (ft) Bus	40	40	40	45	45	60	40	40	40	40	60
Straight Truck	35	45	40	45	45	60	40	40	35	40	60
Trailer (Semi/Full)	45	NS	NS	NS	NS	NS	NS	45	NS	48	NS
Tractor-Semitrailer	60	80	60	65	65	60	60	65	55	60	85
Doubles	NP	80	NP	65	105	NP	NP	65	NP	65	85
Truck and Trailer	60	80	60	65	65	60	55	65	55	55	85
Truck and Trailers	NP	80	NP	65	85	NP	NP	NP	NP	NP	85
Triples	NP	NP	NP	NP	105	NP	NP	NP	NP	NP	NP
Overhang (ft)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

38 ft or longer, by permit. **Overhang**—Rear overhang on a single unit may equal ¾ of the length of the vehicle's wheelbase; rear overhang for a combination may equal ⅓ the length of the combination wheelbase. Overhang is measured from the rear axle centerline to the rear of the load.

Weight—Steering axle weight limited to 550 lb per in. tire width subject to maximum of 20,000 lb. **Tolerance**—No statutory tolerance. Working tolerance of 500 lb/wheel, 1000 lb/axle, 2000 lb/tandem, 3000 lb/groups of axles, 4000 lb/GCW.

Long Combinations—Doubles and triples 65-ft on Class AA roads. Up to 105-ft and 105,000 lb GCW on designated highways with permit.

PENNSYLVANIA
Weight—Maximum weight practicable with less than 5-axles is 73,280 lb. **Steering axle**—800 lb per in. tire width. **Tolerance**—3% on all weights except on interstate highways.

Pennsylvania Turnpike—Tractor-semitrailer allowed 70 ft length and 100,000 lb GCW. With permit 100-ft combinations and 125,000 lb.

RHODE ISLAND
Weight—Maximum weight practicable on non-interstate highways 73,000 lb. 3-axle single units with less than 16-ft wheelbase limited to 44,000 lb. 3-axle tractor-semitrailer with less than 22-ft combination wheelbase, 46,000 lb; with less than 27-ft combination wheelbase, 50,000 lb. 5-axle tractor semitrailer may carry up to 99,000 lb with permit. **Axles**—32,000 lb limit on tandems spaced less than 6 ft apart. **Tolerance**—No statutory tolerance.

SOUTH CAROLINA
Length—Single units with three axles limited to 40 ft.

Weight—Maximum weight practicable on non-interstate highways is 73,280 lb plus tolerance. **Axles**—On interstate highways tandems limited to 35,200 lb. With no more than 40,000 lb per tandem, a gross weight of 90,000 lb will be permitted on 5 axles combinations under special conditions. **Tolerance**—10% on state roads; no tolerance on interstate highways.

SOUTH DAKOTA
Length—No set maximum for permit lengths. Permits issued based on routes, traffic, etc.

Width—100 in. for loads of pulpwood; 102 in. for concrete pipe or baled feed—both on state roads.

Weight—Maximum weight practicable up to 95,000 lb. Maximum weight on non-interstates depends on bridge formula. **Steering Axle**—20,000 lb or 600 lb per in. tire width whichever is most restrictive. **Tolerance**—No statutory tolerance.

TENNESSEE
Length—Permits required for combination lengths over 60-ft. Maximum length of 120 ft.

Weight—Buses limited to 42,000 lb GVW. **Tolerance**—No statutory tolerance.

TEXAS
Tolerance—No statutory tolerance, but there is a 5% tolerance on axle loads before a violation.

UTAH
Length—Tractor-semitrailer, truck and full-trailer and doubles require permit for 75-ft or longer lengths.

VEHICLE WEIGHT LIMITS

		SOUTH CAROLINA	SOUTH DAKOTA	TENNESSEE	TEXAS	UTAH	VERMONT	VIRGINIA	WASHINGTON	WEST VIRGINIA	WISCONSIN	WYOMING
	Steering Axle (1000 lb)	[illegible]	20	[illegible]		[illegible]		[illegible]	[illegible]	[illegible]		[illegible]
	Single Axle (1000 lb)	20	20	20	20	20	22.4	20	20	20	20	20
	Tandem Axles (1000 lb)	36	34	34	34	34	36	34	34	34	34	36
	Min. Axle Spacing (in.)	40	40	40+	40	40+	48+	40+	40+	40+	42+	40+
Maximum Gross Practicable	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	[illegible]	[illegible]	54	[illegible]	54	[illegible]	[illegible]	53.5	40	[illegible]	[illegible]	[illegible]
	2 Axle Tractor, 1 Axle Trailer	50	52	48	50	51.6	56.8	52	60	52	52	52
	2 Axle Tractor, 2 Axle Trailer	66	66	62	66	66.8	70.4	66	60	66	66	66
Maximum Gross	3 Axle Tractor, 2 Axle Trailer	80	80	80	80	80	80	79.8	80	80	80	80
	Doubles	NP	85.5	NP	80	80	NP	NP	80	NP	80	80
	3 Axle Truck, 2 Axle Trailer	80	85.5	83.5	80	80	80	79.8	80	80	80	80
	[illegible]	NP	95	73.2	80	80	80	79.8	80	80	NP	[illegible]
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Weight—Tandem axles allowed 36,000 lb with permit. **Tolerance**—No statutory tolerance.

Long Combinations—Doubles and triples allowed 105 ft; a truck and two full-trailers allowed 95 ft. Up to 121,700-lb GCW by permit.

VERMONT

Width—102-in. on state roads.

Weight—55,000 lb single unit not permitted on interstate highways, and if a 3-axle single unit has only one drive axle on the tandem GVW is limited to 46,000 lbs. 4-axle single unit allowed 60,000 lbs on state roads.

VIRGINIA

Weight—3 axle single unit maximum is 54,000 lbs. Permits needed when axle limits exceeded but GCW under 80,000 lbs. **Tolerance**—No statutory tolerance.

WASHINGTON

Length—73-ft combination tractor-semitrailer if stinger-steered. Annual permits for 75-ft combinations. No semitrailer length limit is specified for 65-ft combinations or longer.

Buses—over 35-ft length on designated highways only.

Weight—2-axle single units with less than 102-in. wheelbase limited to 34,000 lb. **Steering Axle**—660 lb per in. tire width if tires are 12 or more inches wide. **Tolerance**—No statutory tolerance.

Long Combinations—Rocky Mountain Doubles permitted with up to 105,000 lb GCW with permit.

WEST VIRGINIA

Length—3-axle single units limited to 40 ft. **Height**—13½ ft on designated highways.

Weight—Maximum weight practicable on some designated highways is 73,500 lb, or 65,000 lb. **Tolerance**—No statutory tolerance.

WISCONSIN

Length—50 ft single and 65-ft combinations by permit on designated highways. 60-ft tractor/trailer length if trailer is 48-ft or less; longer trailer requires 55-ft overall length.

Width—loads of pulpwood permitted 102-in. Annual permits available for widths up to 168-in.

Weight—Weight limits shown are for Class A highways. Class B highway limits are 40% less than Class A, except for approved local deliveries. **Tolerance**—No statutory tolerance.

WYOMING

Width—102 in. on designated highways for buses, forestry products or baled hay.

Weight—Maximum weight practicable on primary and secondary roads (non-interstate) is 101,000 lb, with 7 axles and 70-ft wheelbase. 20,000-lb single axle limit requires 50-ft wheelbase. **Tolerance**—No statutory tolerance.

Long Combinations—Rocky Mountain doubles permitted 101,000 lb on 7 axles.

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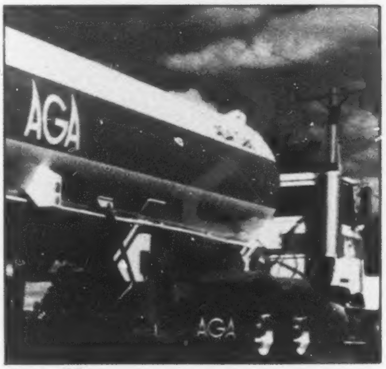

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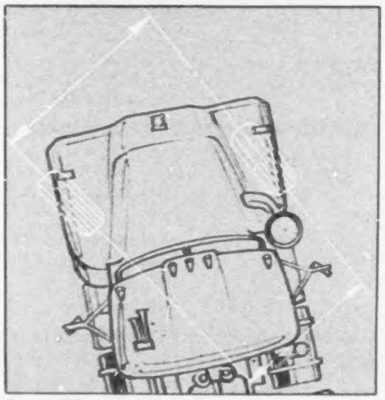
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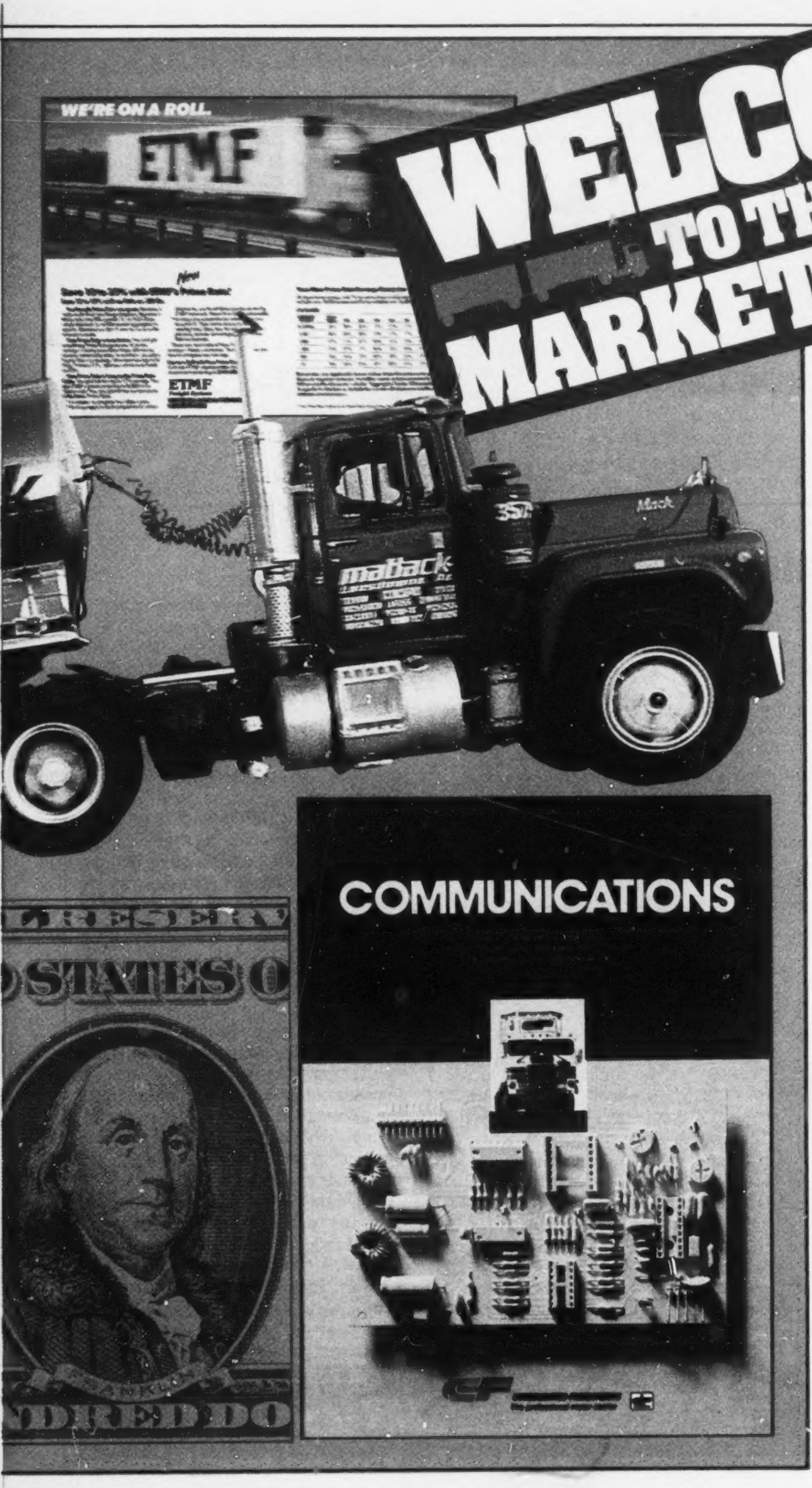


You can offer the best service in the world, but if you don't advertise the fact, you are wasting your time. CCJ takes a look at the changes in marketing and advertising through the eyes of four carriers whose different experiences show the pitfalls and successes that are facing for-hire trucking in the marketplace of today.

By **JIM GALLIGAN**, *Feature Editor*

"Nobody cares if you have authority west of the Mississippi; everyone does. It's how you sell yourself that counts."—Nancy Burns, executive director of the Sales and Marketing Council of American Trucking Associations.

Matlack, the nationwide bulk hauler headquartered in suburban Philadelphia, was traditionally a well run, profitable carrier with a penchant for keeping a low profile. Matlack studiously avoided publicity, preferring to quietly go about its business of making money. Its one concession to publicity was to call itself the "Pipeline on Wheels."

Times change. Last year, despite a 21% drop in revenues to $158 million, the company hired a marketing and advertising firm, increased its sales and marketing budget "by the high six figures," according to Robert Shertz, president, and initiated a nationwide advertising campaign. Gone

Continued

is reliance solely on the "Pipeline on Wheels" slogan, replaced by a frontal assault of public relation releases, direct mail inquiries and magazine advertising.

Back in 1978, Interstate Freight System, Grand Rapids, Mich., was heading for tough times, whether management knew it or not. That year was the last profitable one Interstate had, with after tax income of $7.1 million on revenues of $222 million. Its operating ratio was 95.6, and the company had enough money to start Direct Transportation System, LTD, a Canadian subsidiary.

Interstate's market was the northern midwest and northeast with 18 of the top 20 manufacturing states and 76% of the manufacturing plants in its area. With deregulation and the ensuing recession hitting their main market, Interstate began a slide that produced a $14.1 million loss in 1980 and an operating ratio of 105.6.

Such losses would have called for retrenchment, if they occurred in pre-deregulation days.

Instead, the company decided the best way to turn things around was to go on the offense. And although 1982 revenues were down about 21% from '81, the company has expanded linehaul operations south and west, two areas it had ignored. It brought in a new vice president of sales and marketing last June and is now spending between 3½% and 5% of its expenditures on sales, marketing and advertising.

Marketing in the trucking industry, especially the for-hire sector, is so new that no one knows who is doing it and how much they are spending. The only index ATA has is the growing attendance at their sales and marketing seminars plus a doubling in the council's membership to 700, said Nancy Burns, ATA marketing counselor. These are the indications that "marketing is finally reaching the level of importance in trucking that it has had for years in private industry," she said.

Finding your niche

In the series of interviews conducted for this article, one thing stands out when it comes to knowing what for-hire carriers need to begin an advertising program: know your market. All the advertising money and sales support is meaningless if the carrier doesn't know what market to sell its service to. It sounds elementary, but it is the foundation of all successful operations.

Getting there requires research—internal and external. In the process, a lot of companies get a much different picture of themselves than what they originally thought.

Figuring out where you want to go can be enlightening, especially if the company has not formalized its goals in years. The smart companies, according to Alex Thompson, owner of Management Resources Associates, Yardley, Pa., start with a long-range set of goals. Matlack, for example, has a five-year plan to grow 150% from 1982 levels, according to Robert Shertz, president. That means gross revenues of about $500 million. They expect the growth to come from sales and acquisitions which translates to growth in market share, not necessarily growth in the bulk hauling market.

After your company has set its objectives, you need to analyze your situation to figure out how you're going to reach your goals. This means analyzing your present customers. "It requires a lot of for-hire carriers to go back to their corporate mission and policy," Thompson explained. "They have to take themselves apart and see what they have been doing."

This means looking at their customers and their freight. Which businesses are high volume? Which are more costly? Look at the shipper's business. Is one making buggy whips while another makes high-tech consumer items? What are their respective futures? Take the markets apart, break them down into comparable segments and get a look at where your business is really coming from.

Research and marketing analyses are based on four fundamental strategies, Thompson said: product (in this case it's your service); price; promotion compared with competition; and distribution. Analyze each market segment with these four guidelines. "You should be figuring out if your strategies in each market were sound," Thompson said. "If not, get rid of them."

Most of the answers to these questions are already in your company files. Thompson's advice is to look inside the company first, at your own records, before considering going outside for help.

You may be reluctant to call in an outsider to analyze your situation, but Thompson contends that an outsider will bring four things into the research that the company could never provide.

The first is objectivity. "A company just can't be objective about itself," he said. "Everyone has a position to protect, and they can't be objective about analyzing themselves." Second, an outside marketing firm will get better, more honest answers because the respondents won't know who is asking the questions and, therefore, won't give biased answers. The reverse is important, too, Thompson said. Third, an outside firm can guarantee anonymity to the respondents. Finally, if the research is being done by company personnel, they may get nervous and begin wondering what internal changes may be coming.

In looking for a marketing firm to handle research, trucking experience is not necessarily a must, Thompson said. "Find someone with experience in what you want done, not necessarily experience in your field." It's more important that they know how to get the information you want rather than to know what it is. But go to someone involved in industrial marketing, not consumer marketing.

Outside of the local telephone book, there are several sources with lists of industrial marketing research firms. The American Marketing Association, 250 South Wacker Drive, Suite 200, Chicago, Ill. 60606 publishes a directory of marketing firms by vocation. The New York City chapter of the AMA also publishes a directory called the Green Book.

Importance of market research

There has been a lot of expansion since 1980. Roadway, Consolidated Freightways and all of the major nationals have opened terminals and expanded their territories. And almost everyone else has, too. But there is still a lot of over capacity in the market caused in part by the recession and deregulation. Even as the economy improves, it's questionable how much of that market pie will be available for everyone. Sooner or later, some companies will be left without a piece at all.

That is the reason for market research (see box). Find the right niche for your services. "I think a lot of companies are still trying to identify their niche," said Marty Hymes, vice president of marketing for Matlack. "Some are trying to be what they aren't. The most important thing for a carrier is to decide what its business is, then develop that," he said.

"You can't over emphasize the importance of market research, especially in expansion," Shertz said. "Some carriers expand just to pick up revenues rather than expanding into sensible markets." The result of some unwise moves is that you will be priced out of that market, he said.

Market research told Matlack several things, Shertz said. One was that most of their potential customers saw all bulk carriers as essentially the same. So Matlack's advertising campaign emphasizes nationwide delivery and related services, Shertz said. The company also learned they were not as well-known in the southeast and south as management thought. So the company opened eight terminals there last year.

Surveys and market research performed a similar task for Interstate System. Robert Olterman, senior vice president of sales and marketing, said the company did not necessarily need extensive customer surveys to realize it had an identity problem. Interstate was perceived as being an in-between size—neither a national carrier nor a regional one. The recession had killed most of its market in the northeast. "Interstate had some operations in the south," Olterman said, "but it operated mainly in the northeast with more than 50% of its business located there. We had to get IMFS out of the posture as a regional carrier in order to expand.

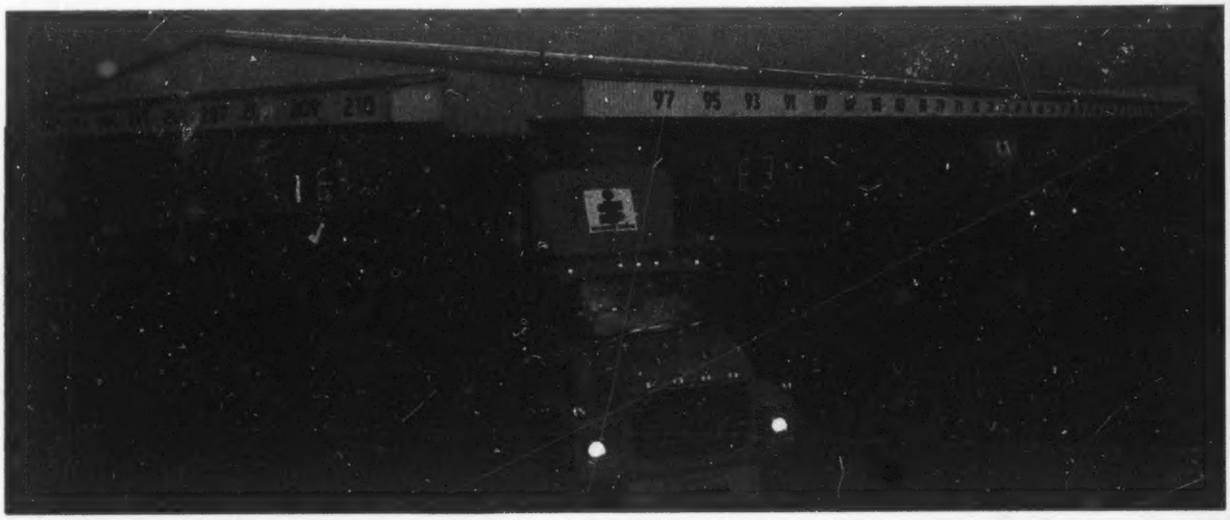
So the company did research to find out where to expand, Olterman said. Based on the results of that research they have established piggyback service over six rail lines from Kansas City to 27 service centers and cartage agents in five western states. They have also added 30 more service centers in five southern states. The goal, Olterman said, is to be a truly nationwide carrier.

But for every case of big buck research studies and planning, there is probably another success case where just the opposite was true. Bishop Motor Express, Grand Rapids, Mich., is one example.

Three years ago, the company was featured in CCJ as an example of a small cartage agent that survived by running used equipment, keeping overhead costs minimal and working in a specific niche of the market: service to rural Michigan. Annual revenues were about one million. Though it offered nationwide connections via national carriers, it had only one terminal, and its own routes were no longer than 50 miles.

But time and change have not escaped Bishop Motor Express. The company recently opened a terminal in Chicago, its eighth one. It is serving eight states with direct service to the twin cities of Minneapolis/St. Paul, Atlanta and stops in between. It has approximately 50 power units, mostly one- and two-year-old Freightliners bought new and about 100 trailers, including 30 27-ft pup trailers that will be used in doubles operations. Gross revenues have tripled in three years to over $3 million dollars.

Ironically, if things have been good for Bishop Motor Express, it seems to be because of all the "old" pre-deregulation reasons. The company didn't spend money for market research or analysis. It didn't bring in a consultant to tell the company where to ex-



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pand. It expanded where it did because management was familiar with the area, the shippers, where the potential business would come from and where it was going. Then, according to Cornelius Bishop, president, the company went out and gave the customers the service they wanted. Ironically, one reason given for Bishop's increased business is that Associated Truck Lines, a subsidiary of ANR Freight System, Detroit, which had a large presence throughout Michigan, has reportedly closed down several rural terminals. "It's not that they don't serve the area anymore," Bishop said, "but they don't have the physical presence they once had." Without that presence, he said, local shippers felt no loyalty and so they switched to a carrier that still had a presence in the area.

Changing salesman

A pre-deregulation salesman tended to come from within the company and had extensive product knowledge, but the art of selling, *per se*, wasn't emphasized. The trend among the big fleets now is to hire professional salesmen with the ability to influence and persuasively convince customers of a fleet's special value in a competitive environment. Then they give them intensive product training to pick up information on the industry. "Salesmanship is the number one criteria we look for in new salesmen," Olterman, of Interstate, said. "We're teaching more probing skills today than ever before, as well as negotiating ability."

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matlack

Matlack has apparently changed their recruiting stance, too. "We're looking for a high-drive individual," Shertz said. "Prior to 1980 salesmen were less concerned with their profile and their ability to influence people than they were with product knowledge. But now the salesman has to look at a customer's total distribution situation and put it together."

There are also more people out there selling so the trucking companies have to increase their sales forces. Interstate System has between 140 and 150 salesmen and agents, Olterman said. Matlack increased its sales force to 38 from 18 and wants to add two more, according to Chip Rawson, vice president of operations.

Donald Scranton, vice president of marketing for Duff Truck Lines, Lima, Ohio, agrees that since the nature of the for-hire sector has changed so has the role and needs of the salesman. "For-hire trucking is more time demanding now than before deregulation; there is more personal contact with major customers, and negotiations are more important now than in the past," he said. Because of the industry competition, Scanlon believes the salesman will be one of the main reasons for a fleet's survival. "A strong marketing and sales force now will see a carrier through turbulent times and leave it a much stronger organization for the future when the economy turns around," Scanlon said.

Marketing does not exist in a vacuum. Its purpose is to define the fleet's customers, highlight the specialties of the fleet and give the salesmen ammunition when trying to sell the services. There has to be coordination between marketing and sales. "Once the company has identified its goals and knows what product it wants to sell," Burns, of ATA, said, then give that information to the salesmen for direction and contacts, instead of the shotgun effect you get when they go out and just contact any business in their territory.

Advertising

The most visible change in trucking has been in advertising (see box). In 1982 for-hire carriers ran a total of 627 pages of advertising in the four trade journals: *Distribution*, *Handling & Shipping*, *Traffic Management* and *Traffic World*. That number represents a 228% increase over total pages in 1981 (191) and a 275% increase over 1980's 167 pages. In an era of intense competition, the best and most pervasive image counts for a lot.

"Advertising is important, not because it sells loads," Shertz said, "but because it serves as an introduction to the salesman. It gives the customer exposure to the company that he didn't have before."

Interstate started its advertising campaign in 1981 with 57 pages, Olterman said. Total pages were down last year though as evidenced by the 12 total pages in the four trade journals mentioned above.

Interstate wants to be known as a national carrier. To be successful, they need a nationwide image. "When you think of the national companies you think of six or seven truly national carriers," Olterman said. "We want to be sure we're in that six or seven companies people think about." So the company has directed its advertising and direct mail efforts at national accounts. They are also trying to pick up traffic from the private carrier. "At some point in the private carrier's distribution system the company is going to need the service of an LTL carrier. Interstate wants to be that carrier," Olterman said.

Duff Truck Lines, on the other hand, feels its niche is as a regional carrier. Duff ran 11 pages last year in those four journals. The advertising sells Duff's LTL distribution and consolidation service to 2000 midwest communities

Judging the results

"Market share is the key index of how well you're doing," Olterman said. That is another new gauge truckers have to get used to. As they expand and move into new markets, their customer base gets broader. It is difficult for an LTL carrier whose business comes from a homogenous mix to know which traffic makes money and which doesn't.

"We now have to look at how well we're doing in individual markets," he said. "Previously, we used to look only at the total picture." It may be easier for a bulk carrier. Their product is more specialized and it is easier to see where they are in relation to their competition. Matlack had about 7½% of the bulk industry's $221 billion in revenues in 1981. Shertz said the company increased its share last year by expanding into the south and Pacific northwest.

The lesson of the '80s so far is that companies must learn they can't be everything to everybody, as Burns said. If expansion is solely for the sake of revenue without sensible moves, then any shifts in the economy and changing trends in transportation modes will catch the carrier with a shrinking customer base and no money to readjust. The truckers are now on their own. Since there is no more rate and authority protection from the government, the consensus is that it is imperative that the companies know where they are going. "It's the smart companies," Burns, of ATA said, "that were out there, though times were tough, putting money into sales and marketing departments. They're the ones that will survive.

Top 1982 For—Hire Advertisers

Company	Total Pages	Cost
I U International Phila., Pa.	67	$210,829
Leaseway Corp. Cleveland, Oh.,	49.75	$154,528
Carolina Freight Carriers Cherryville, N.C.	42	$136,585
ABF/ETMF Fort Smith, Ark.	38	$123,943
Consolidated Freightways Menlo Park, Calif.	35	$116,962
Pilot Freight Carriers Winston-Salem, N.C.	31	$101,744
Transcon Lines Los Angeles, Calif.	30	$96,771
ANR Freight System Detroit, Mich.	28	$82,628
APA Transport North Bergen, N.J.	19	$67,370
McLean Truck Co. Winston-Salem, N.C.	26	$60,502
Lee Way Motor Freight Oklahoma City, Ok.	19	$56,693

Listed above is a compilation of 1982's 11 most frequent for-hire motor carrier advertisers in the following four trade magazines: *Distribution, Handling & Shipping, Traffic Marketing* and *Traffic World*. The costs are conservative estimates based on charges for a one page, black and white ad (one time rate) as listed for each magazine in the March 1982, Standard Rate & Data Service, Inc. (SRDS) book. Most advertisements are full color so a more accurate cost would probably be higher. This does not represent total advertising expenditures. Consolidated Freightways, for example, spent more than $950,000 last year, according to the 1982 Rome Report.

Carriers with strong marketing programs are stripping market share away from carriers with weak programs.

Increased competition, new markets mean carriers must expand their marketing efforts to survive.

Recruiting or retaining marketing/advertising professionals, performing market research, developing more sophisticated sales efforts are expensive, but necessary items helping previously non-marketing oriented companies to compete in a more hostile business environment.

Management Bottom Line

For a free single copy of this article, write on company letterhead to: Editor, Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089

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Commercial Carrier Journal...

for Private Fleets & For Hire Trucking

Special Report:
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VOLUME 140 NUMBER 6 JUNE 1983

IN THE NEWS:
DOT proposal calls for total deregulation of the trucking industry—page 18.
Hino enters American truck market; forms Hino Motors (U.S.A.) Inc.—page 42.
CCJ to sponsor first *Transportation Management Congress* in 1985—page 54.

PUBLITORIAL:
Starting with this issue, turn to the last page each month for an informal commentary from CCJ publisher Carl Lock.

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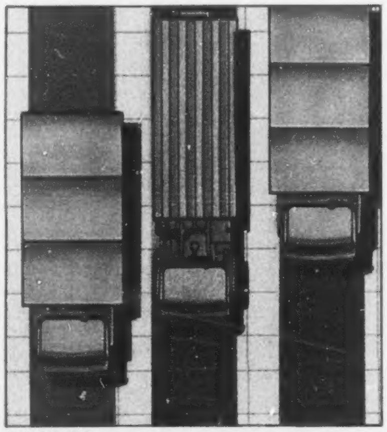

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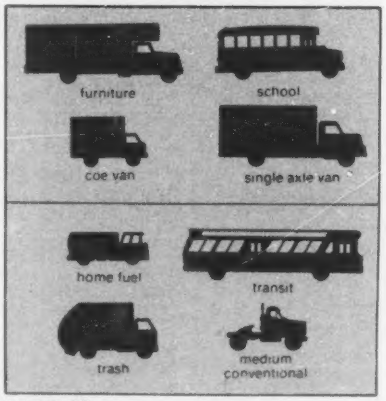

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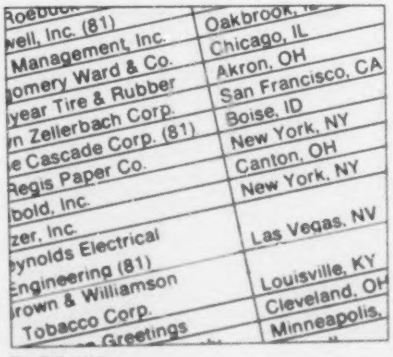
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CCJ's exclusive listing of the 1982 Top 100 for-hire motor carriers. CCJ figures show that the number of carriers reporting financial losses in 1982 increased substantially and that they include some of the best known motor carriers in the industry. **83**

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TRENDS AND STATISTICS
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SPECIAL REPORT: OLD LABELS, NEW IDEAS
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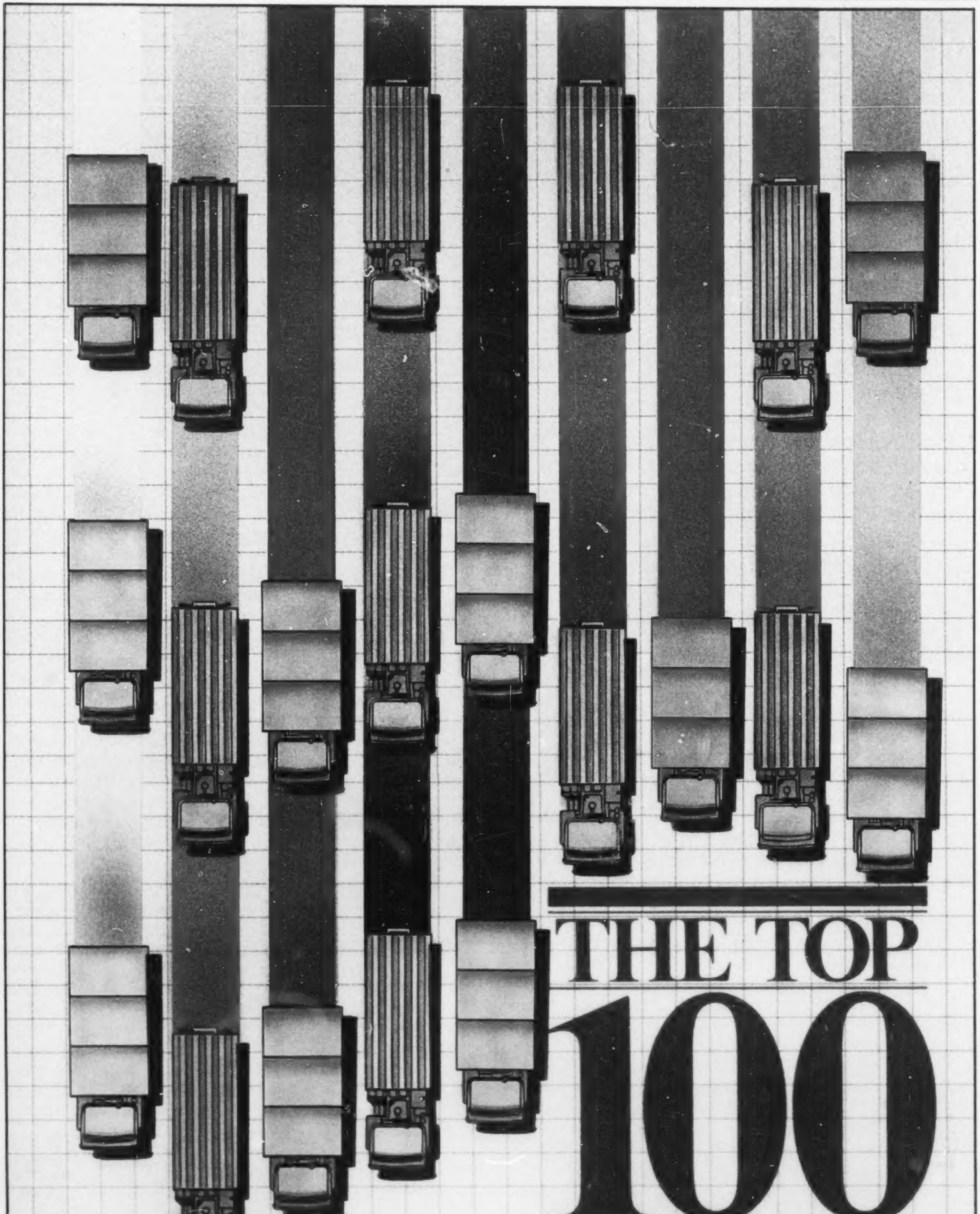
Southland Corp.
Dallas, Tex.



THE TOP 100

1982: A DISASTROUS YEAR

This section, Trends & Statistics and Private Fleets are available as a 24-page booklet at $4. Write: Editor, Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089.

The top 100 for-hire fleets are beginning to heave their first sighs of relief upon reliable indications that an economic recovery is mounting. They can look back at 1982, knowing that they survived the worst year in trucking's history.

By **CARL GLINES**, *Executive Editor*, and **DOROTHY DI NUNZIO**, *Directories and Special Projects*

Financial reports of the 1982 top 100 for-hire motor carrier business activities confirm reports claiming that, while for-hire trucking's condition is not terminal, 1982 certainly was a financial disaster.

An analysis of the top 100 financial data for 1982, as reported exclusively to *Commercial Carrier Journal* by Trinc Transportation Consultants of Washington, D.C., discloses the biggest shakeup of the top 100 since July 1969, when this information was first compiled.

For example, a record setting 39 motor carriers lost money last year, including two carriers that were not in the Top 100 last year, Refiners Transport & Terminal of Ohio and Advance Transportation Company of Milwaukee.

Combined losses for the 39 carriers were in excess of $191 million. This includes companies like McLean Trucking of Winston-Salem, N.C., acquired at mid-term last year by Meridian Express of Dallas, an affiliate of Wedge International of the Netherlands. Wedge also owns Merchants Fast Motor Lines. Meridian also purchased Delta California, parent corporation of Delta Lines and California Motor Express.

Pacific Intermountain Express of Walnut Creek, Calif., a subsidiary of IU International, Philadelphia, Pa., is also among the money losers. P.I.E. reported losses of $3,862,000 on revenues of $394,474,000. Significantly, IU just announced that it was consolidating P.I.E. with its other big general commodity carrier, Ryder Truck Lines of Jacksonville, Fla. Ryder, last year, earned $3.36 million on gross revenues of $622 million and will be the dominant carrier in the consolidation.

What will happen to P.I.E.'s top management, headed by W. Doyle Beatenbough, as a result of this move remains to be seen. However, it is expected that P.I.E. officials in Walnut Creek will be playing a significantly reduced role in the company's overall operations. Beatenbough earlier attributed much of P.I.E.'s financial problems to high labor costs. In asking 200 of his headquarters employees last November to take a voluntary cut of 15% in salary, Beatenbough said: "P.I.E. and most other unionized carriers just cannot survive against nonunion competition considering existing union labor pay scales."

Also reporting losses—$3,000,000—was Smith's Transfer of Staunton, Va., owned by ARA. ARA is one of the country's largest food service and school bus companies; it is headquartered in Philadelphia. ARA just announced the acquisition of Cooper Motor Lines of Greenville, S.C., an owner operator irregular route carrier that had sales of $19.2 million in 1982.

ABF Freight of Ft. Smith, Ark., was another big loser last year, reporting a $12,100,000 loss. But these figures could be distorted because of ABF's acquisition of East Texas Motor Freight of Dallas in 1982. Other losses were reported by such highly regarded carriers as Transcon Lines of Los Angeles; Lee Way Motor Freight of Oklahoma City; Matlack Inc. and Chemical Leaman, the two big eastern Pennsylvania-based tank carriers; and Tri-State Motor Transit of Joplin, Mo., the owner operator carrier specializing in hauling military and commercial nuclear material.

The biggest losers among 1982's top 100 were McLean, $17,267,000; Pacific Motor Freight of San Francisco, $16,600,000; Interstate of Grand Rapids, Mich., $16,257,000. Each of these carriers had an unusually high operating ratio (see charts).

Lee Way, Halls Motor Transit (a subsidiary of Flying Tiger of LA) and IML Freight of Salt Lake City, appear to be financially hemorrhaging.

For example, IML's losses last year topped 1981 losses by $7.7 million, with the company reporting a 1982 loss of $14.3 million on top of a $6.68 million loss in '81. Lee Way losses increased $7.3 million last year to $12.4 million, and Halls reported losses of $9.4 million for 1982 following a $3.9 million loss in '81—a $5.5 million increase.

Irwin H. Silberman, a Potomac, Md., based transportation consultant said general freight carriers lost money last year because of the "combined

Continued

pressures of deregulation and a severe recession."

According to Silberman, 63 carriers went out of business between January 1979 and November 1982. These 63 carriers, he says, represented 14.1% of industry revenues. He also says that carriers representing another 35% of the industry's revenues are candidates for failure.

Another indication of disastrous 1982 business activity in the trucking industry was the record number of bankruptcies among the top 100. Included are Spector-Red Ball, Dallas; Jones Motor, Spring City, Pa.; Midwest Emery Freight, Chicago; Motor Freight Express, York, Pa.; Briggs Transportation, St. Paul; and Eazor Express, Pittsburgh. It should be remembered, however, that a number of for-hire motor carriers that filed for bankruptcy, or for reorganization, have retained their owner operator, specialized commodity divisions, and these operations are profitable. Jones and Eazor Express are two examples of this unique situation.

T.I.M.E.-DC ceased its nationwide operations last year in a dispute over wages and benefits with the Teamster union. While not the biggest employer in town, the Lubbock, Texas-based company reportedly had the largest payroll. After weeks of no activity, the union relented, and a new contract was approved. But freight operations have not yet recovered to prestrike levels. T.I.M.E.-DC last year lost $12.18 million, dropping in ranking to 120 in the second 100 from 37th in the top 100.

Another well-known carrier that does not appear in the top 100 this year is Maislin Transport, a Delaware corporation and subsidiary of Maislin Industries Ltd., of Montreal. Maislin dropped out of the top 100 in 1982 after the company failed to file by deadline, attributing the delay in filing to bookkeeping problems. The company also had not filed by the deadline this year.

Maislin became the source of much controversy in Canada late last year because of a $34 million loan guarantee from the Ottawa government. In a financial statement released in late October, Maislin said it lost $12.7 million (U.S.) in 1981 and another $10.9 million in the first half of 1982. Maislin president Alan Maislin attributed the losses to "fierce competition in Canada and the U.S...and unprecedented rate discounting." Maislin said it had closed or sold 39 terminals, reduced its truck fleet to 5000 units from 7800 and reduced the number of employees to 4200 from 5900.

The lack of enforcement by the Interstate Commerce Commission of its rules and regulations is also reflected in the top 100 statistics. For example, this year, more than any other time since 1969, many carriers simply did not file or chose not to provide full information. Twenty-seven top 100 carriers did not provide data on tire costs, tonnage, and/or shipments carried and vehicles owned or leased. Also, according to Trinc, financial data on 24 carriers had to be calculated from quarterly reports rather than obtained from the usual annual reports. Washington sources say that if Congress sunsets the ICC in 1983 or '84, this information on the performance of for-hire carriers will no longer be available, unless it is voluntarily made public by the companies themselves—an unlikely alternative.

But no matter how bad the trucking industry had it in 1982, some companies still made money. Not as much, perhaps, as they are used to making, but they continue to be profitable.

This includes the two United Parcel Service companies that are numbers one and two on the top 100 list, although some hardliners in the industry refuse to recognize UPS as a legitimate trucking operation.

Another company that continues to be profitable is Roadway Express of Akron, Ohio, earning $74.2 million on gross revenues of $1.1 billion. The company's 1982 gross revenues were slightly better than 1981. Despite the recession and bad economic conditions, Roadway continues to grow, retaining its number three postion in the top 100. Just last month, the company announced it had opened another five terminals, bringing the company's total number of terminals in service to 513. In 1982, Roadway opened 29 facilities and plans on expanding its terminal network even more in 1983.

Roadway also has major plans for expansion into Canada. But that expansion, along with plans to turn over its entire fleet in three years, revitalizing it with all new, more productive equipment, is on hold. Regulatory confusion that can be traced directly to the implementation of the Surface Transportation Assistance Act of 1982, and the possibility of confiscatory federal and state taxes, have temporarily sidetracked the nations largest regular common carrier.

Consolidated Freightways of Portland, Ore., continues its firm hold on fourth place in the top 100. It reported over $1 billion in gross operating revenues for 1982 but earned less last year than it did in 1981. CF earned, after taxes, $36.7 million in '82 but a more appealing $67 million in 1981 on gross revenues of $1 billion.

In a recent report to shareholders, Consolidated Freightways' president Raymond O'Brien was upbeat about the future. He predicted a much improved 1983, and said conditions were already improving, attributing some of the improvement to the drop in diesel fuel prices, which, O'Brien said, had come down 15% between January 1 and April 1 of 1983.

Another way of comparing how well or how poorly a company did is by examining its 1982 operating ratio (OR). Last year, 41 for-hire carriers had ORs greater than 100, meaning they were spending more money than they were earning. Sixteen of these 41 were top 100 repeats from 1981.

A-P-A Transport of North Bergen, N.J., had the best OR, an amazing 82.9, earning $6.5 million in 1982. In 1981, A-P-A reported an OR of 84. Overnite Transportation of Richmond, Va., was second best in 1982, with an 86.2 OR. Interestingly, A-P-A had the best operating ratio despite the fact it is completely unionized and operates in the most congested areas in the country—New York and northern New Jersey, while Overnite has resisted numerous attempts at unionization and still continues to rival A-P-A as one of the nation's best run and best managed companies.

Getter Trucking of Billings, Mont.,

which reported the best OR in 1981, 79.5, had a terrible 1982 and saw it's OR climb to 102. The company also fell out of the top 100 where it ranked 97 in 1981 and is now in the second 100, ranked 146.

In its financial analysis of the trucking industry, the Chase Manhattan Bank says: "...various ratio measures of profitability confirm the financial deterioration of general freight carriers." Chase says while the average size of the carriers in the industry has increased each year over the last five years, average revenue and average earnings per carrier have shrunk in "absolute dollar terms."

Index To The Top 100 As Ranked By Revenue

	1982	1981
AAA Cooper Transportation	94	—
ABF Freight System	10	13
A-P-A Transport	59	76
Advance Transportation	100	—
Aero Mayflower	21	24
Allied Van Lines	12	11
American Freight System	17	19
Anchor Motor Freight	28	28
Associated Truck Lines	25	29
Atlas Van Lines	44	45
BN Transport	67	83
Bekins Van Lines	26	34
Bowman Transportation	45	35
Branch Motor Express	42	39
Brown Transport	37	43
C & H Transportation	46	38
CRST Inc.	65	86
C W Transport	58	58
Campbell "66"	63	65
Carolina Freight	14	16
Central Freight	24	22
Central Transport	39	49
Chemical Express	87	91
Chemical Leaman	34	31
Churchill Truck Lines	81	—
Coastal Tank	71	71
Commercial Carriers	53	59
Commercial Lovelace	74	66
Complete Auto Transit	29	50
Consolidated Freightways	4	4
Crete Carrier Corp.	80	—
Delta Lines	38	41
Duff Truck Line	93	100
Frozen Food Express	85	87
Garrett Freightlines	36	36
Gordons Transports	54	65
Graves Truck Lines	72	78
Global Van Lines	69	77
Groendyke	83	88
Hall's Motor Transit	20	20
Holland Motor Express	82	95
Holmes Transportation	92	—
Interstate System	18	18
I M L Freight	40	33
Illinois-California Exp.	55	51
Internatl. Transport	47	42
Jones Truck Lines	43	57
Lee Way Motor Freight	23	21
Lynden Transport	68	—
M & G Convoy	79	89
Mason & Dixon	35	30
Matlack Inc.	32	23
McLean Trucking	7	7
Merchants	51	53
Midwest Coast Transport	77	84
Midwestern Distribution	73	92
Milne Truck	66	82
Mistletoe Exp. Service	88	—
Motor Convoy	84	94
Murphy Motor Freight	62	68
National Freight	64	70
No. American Van Lines	8	8
Northwest Transport	75	—
Nu-Car Carriers	61	80
Old Dominion	49	60
Oneida Motor Freight	99	—
Overland Express	95	—
Overnite Transportation	11	14
P.I.E.	9	9
Pacific Motor	41	56
Penna. Truck Lines	70	—
Pilot Freight	33	40
Poole Truck Line	86	—
Preston Trucking	19	27
R-W Service System	96	75
Red Star Express	56	67
Refiners Transpt. & Term.	98	—
Refrigerated Transport	31	46
Riss Internatl. Corp.	60	62
Roadway Express	3	3
Ryder Truck Lines	6	6
St. Johnsbury	27	44
Santa Fe Trail	90	90
Schneider Transport	30	32
Schwerman Trucking	76	73
Shaw, Willis	89	98
Signal Delivery	22	26
Smith's Transfer	13	12
Southeast Freight Lines	97	—
System 99	78	74
Thurston Motor	52	61
Transcon Lines	15	15
Transus Inc.	57	64
Tri-State	50	48
United Parcel (Ill.)	1	1
United Parcel (NY)	2	2
United Transport	91	79
United Van Lines	16	17
Watkins Motor	48	52
Yellow Freight	5	5

Chase says the economic outlook for 1983 indicates that the motor carrier industry should not anticipate brighter days until the second half of 1983. "It will be unfortunate," Chase added, "if many of the companies that survive this extremely difficult period are unable to participate in the forecasted growth of late 1983."

Investment in revenue equipment has understandably been low, Chase observed, and predicts that by mid-'83 equipment should be in need of replacement. But, Chase says, in most cases, motor carrier cash flow is adequate to service only existing debt. Obtaining additional financing will be difficult because of the industry's "track record of two years of poor earnings."

Like CF's O'Brien, Chase also believes that lower fuel prices will help to stimulate a recovery among for-hire carriers this year. Chase also said that cost savings from "lower fuel prices have helped reduce the impact of rate discounting." But Chase sees no long-term savings in fuel costs and suggests that prices may go back up as the economy gets stronger.

Chase observes that in the more competitive environment in which trucking now operates, the successful carrier is the carrier that becomes more sophisticated in marketing and sales. "Sales orientation is increasingly geared toward determining the needs of the shipper and solving his distribution problems in a cost-effective manner," Chase says.

Chase adds: "We continue to state that the future belongs to the well-managed, well-financed and well-positioned companies in highway transportation."

About the best thing that can be said about 1982 is that it is history. With a disastrous year behind them, for-hire carriers must now put on a bright face and learn to do better what they do best: moving the nation's freight in the most efficient, most cost effective manner possible.

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1982'S TOP 100

Rank '82	Rank '81	Fleet	Type[1]	Financial Data (÷000) Gross Oper. Revenue	Expenses	Net Income after Taxes[3]	Owned Vehicles[2] Trucks	Tractors	Trailers	(÷000) Total Equip. Exp.
1	1	**United Parcel Service—OH, St. Charles, IL**	CMGF	$3501929	$3147014	$189233	25825	3785	13245	$223907
2	2	**•United Parcel Service—NY, New York, NY**	CMGF	1392047	1311891	38173	na	na	na	na
3	3	**Roadway Express, Akron, OH**	CMGF	1147459	1063883	74237	1117	7354	14494	83524
4	4	**Consolidated Freightways, Portland, OR**	CMGF	1036826	979701	36711	245	6329	16863	73813
5	5	**Yellow Freight System, Overland Park, KS**	CMGF	903562	887071	10358	561	5412	13346	70497
6	6	Ryder Truck Lines, Jacksonville, FL	CMGF	622235	612518	3361	841	2920	6615	35228
7	7	McLean Trucking, Winston-Salem, NC	CMGF	491892	514252	17627d	204	3158	6514	35877
8	8	North American Van Lines, Fort Wayne, IN	CMHG	491273	471042	21450	34	81	6701	N/A
9	9	Pacific Intermountain Exp. Walnut Creek,CA	CMGF	394474	400570	3862d	362	2259	6875	28523
10	13	ABF Freight System Inc., Ft. Smith, AR	CMGF	302902	307591	12100d	251	1780	5665	16321
11	14	**Overnite Transportation, Richmond, VA**	CMGF	287820	255098	18415	177	2765	5882	23117
12	11	**•Allied Van Lines, Broadview, IL**	CMHG	273958	274700	1791	na	na	na	na
13	12	**Smith's Transfer, Staunton, VA**	CMGF	270231	274582	3000d	332	2611	4803	17930
14	16	**Carolina Frt. Carriers, Cherryville, NC**	CMGF	1268374	256389	6024	169	1944	4018	20253
15	15	**Transcon Lines, Los Angeles, CA**	CMGF	249409	256758	7161d	137	1697	3624	19997
16	17	•United Van Lines, Fenton, MO	CMHG	245426	245158	1346	na	na	na	na
17	19	American Freight System, Sioux Falls, SD	CMGF	241633	242550	37	65	1478	4560	15817
18	18	Interstate System, Grand Rapids, MI	CMGF	226673	240370	16257d	112	1443	3473	11896
19	27	Preston Trucking, Preston, MD	CMGF	218048	211903	5145	40	1609	3591	15295
20	20	Halls Motor Transit, Mechanicsburg, PA	CMGF	215335	224925	9412d	64	1766	3924	16603
21	24	**Aero Mayflower Transit, Indianapolis, IN**	CMHG	202214	196911	3561	0	11	1095	N/A
22	26	**Signal Delivery Service, Hinsdale, IL**	CTRS	193293	182632	7888	287	1387	5728	133776
23	21	**Lee Way Motor Frt., Oklahoma City, OK**	CMGF	187932	214272	12438d	154	1355	3861	12062
24	22	**•Central Freight Lines, Waco, TX**	CMGF	187745	183450	6140	na	na	na	na
25	29	**•Associated Truck Lines, Grand Rapids, MI**	CMGF	183117	185673	1425d	na	na	na	na
26	34	•Bekins Van Lines, Hillside, IL	CMHG	174497	170098	3807	na	na	na	na
27	44	St. Johnsbury Trucking, St. Johnsbury, VT	CMGF	167269	157035	5450	0	0	0	8285
28	28	Anchor Motor Freight, Cleveland, OH	CTMV	162741	160252	1174	0	1923	2104	13437
29	50	Complete Auto Transit Inc., Detroit, MI	CTMV	162234	150656	5920	0	1668	1668	19756
30	32	•Schneider Transport Inc., Green Bay, WI	CMSC	160072	158817	1024	na	na	na	na
31	46	**•RTC Transportation Inc., Forest Park, GA**	CMRS	157426	151007	2166	na	na	na	na
32	23	**•Matlack Inc., Lansdowne, PA**	CMLP	156163	153303	1011d	na	na	na	na
33	40	**Pilot Frt. Carriers, Inc., Winston-Salem,NC**	CMGF	154034	161411	7480d	46	786	1976	10760
34	31	**Chemical Leaman Tank Lines, Downingtown, PA**	CMLP	151456	152843	2735d	0	1099	2926	19234
35	30	**Mason & Dixon Lines, Kingsport, TN**	CMGF	149014	157507	10750d	183	1193	2386	8193
36	36	Garrett Freightlines, Pocatello, ID	CMGF	148258	144033	2082	194	1086	2471	9034
37	43	•Brown Transport Corp., Atlanta, GA	CMGF	137711	130122	5474	na	na	na	na
38	41	Delta Lines Inc., Oakland, CA	CMGF	137097	137535	513d	335	1471	3203	7944
39	49	•Central Trnsport Inc., Sterling Hgts., MI	CMGF	136971	134737	3242	na	na	na	na
40	33	I M L Freight, Salt Lake City, UT	CMGF	133100	143941	14398d	117	974	2068	11412
41	56	**Pacific Motor Truck, San Francisco, CA**	CMGF	131856	147739	16600d	358	722	1607	12561
42	39	**•Branch Motor Express, New York, NY**	CMGF	128854	136766	10785d	na	na	na	na
43	57	**•Jones Truck Lines Inc., Springdale, AR**	CMGF	128278	121190	4446	na	na	na	na
44	45	**Atlas Van Lines Inc., Evansville, IN**	CMHG	127870	123472	5161	0	2	79	N/A
45	35	**Bowman Transportation, Atlanta, GA**	CMGF	127217	131229	1394d	258	1309	3150	10693
46	38	C & H Transptn. Co. Inc., Dallas, TX	CMSC	116409	109245	2681	10	287	2652	6961
47	42	International Transport Inc., Rochester, MN	CMHM	113554	10975[illegible]	1387	0	0	2588	4457
48	52	Watkins Motor Lines Inc., Atlanta, GA	CMGF	111357	107007	1773	24	232	160	4144
49	60	Old Dominion Frt. Lines Inc., High Point, NC	CMGF	105040	101506	557	48	642	1562	7418
50	48	Tri-State Motor Transit, Joplin, MO	CMHM	103032	102503	703d	18	339	2306	8622
		TOTAL TOP 50—1982		$17,217,317	$16,934,519	$328,563	32,899	94,877	187,793	$887,347
		TOTAL TOP 50—1981		17,748,723	16,328,537	608,425	43,686	73,534	183,948	1,036,749
		TOTAL TOP 50—1980		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Equipment Data		[illegible] Operating Data (+000)												
		Tons Carried[3]		No. of Shipments		Miles Operated								
							Rented Vehicles							
Avg. No. Units, Equipm.	(+000) Tires & Tubes	TL	LTL	TL	LTL	Owned Vehicles	With Drivers	Without Drivers	RoC & Water Miles[4]	Avg. Load (tons)	Avg. Haul (miles)	1982 Oper. Ratio	1981 Oper. Ratio	Rank By Oper. Ratio[5]
2826	$19730	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	89.9	88.6	4
na	na	na	na	na	na	na	na	na	na	na	na	94.2	93.9	16
827	11810	1549	3273	136	9759	368104	1928	0	11148	14.2	1121	92.7	91.9	7
902	9300	1722	2692	142	7384	350055	21925	38	7572	15.9	1365	94.5	92.4	t18
1037	9809	1928	2267	143	6776	311950	20957	21883	2626	13.9	1108	98.2	96.2	t33
426	6253	3941	1505	248	3469	163671	40973	69677	3708	13.8	704	98.4	95.0	t35
660	6123	1311	1369	103	4270	176935	10031	11039	6734	12.7	970	104.5	101.4	t62
N/A	5254	N/A	2101	N/A	N/A	N/A	327625	0	0	6.5	1014	95.9	94.8	t20
375	4005	2628	762	140	2345	139130	18451	17873	186	14.3	741	101.5	97.1	t50
228	2604	1106	798	77	2049	104556	13018	12085	0	14.1	959	101.5	97.9	t50
445	3902	1325	1358	98	3825	134638	0	1	93	9.9	499	88.6	86.2	2
na	na	na	na	na	na	na	na	na	na	na	na	100.3	99.9	t42
298	2573	794	1077	64	2466	100518	0	0	118	12.1	701	101.6	97.6	51
364	2738	846	928	64	2261	82567	9877	744	3959	11.9	661	95.5	95.9	19
257	2666	805	580	62	1490	91926	15193	0	552	16.0	1244	102.9	99.7	57
na	na	na	na	na	na	na	na	na	na	na	na	99.9	100.9	t40
252	2641	668	864	50	2313	64450	141	19836	109	11.5	635	100.4	99.4	43
152	2074	1645	625	99	1678	64025	24614	7702	992	14.2	609	106.0	102.8	66
269	1904	1220	874	93	2149	50184	9257	9097	2000	11.6	401	97.2	95.5	t28
215	1808	1085	776	77	1967	51638	3372	8527	0	12.2	418	104.5	102.6	t62
N/A	168	N/A	381	N/A	N/A	0	94704	0	0	4.2	1033	97.4	98.0	t29
na	3450	N/A	2006	N/A	N/A	90672	0	0	0	6.6	296	94.5	95.2	t18
169	1481	714	442	48	1173	79647	7126	2058	300	14.7	1133	114.0	103.9	72
na	na	na	na	na	na	na	na	na	na	na	na	97.7	93.7	t32
na	na	na	na	na	na	na	na	na	na	na	na	101.4	101.0	t49
na	na	na	na	na	na	na	na	na	na	na	na	97.5	98.1	30
112	1473	574	772	613	2603	0	0	34808	0	8.7	226	93.9	96.9	t14
218	4008	N/A	1913	N/A	N/A	75098	0	976	0	7.0	277	98.5	95.6	t36
189	3746	N/A	1645	N/A	N/A	74824	8799	0	0	8.0	408	92.9	99.2	9
na	na	na	na	na	na	na	na	na	na	na	na	99.2	99.4	t37
na	na	na	na	na	na	na	na	na	na	na	na	95.9	97.6	t20
na	na	na	na	na	na	na	na	na	na	na	na	98.2	91.1	t33
145	1845	552	622	44	1573	58816	2247	846	835	11.1	604	104.8	102.6	63
297	3543	N/A	5309	N/A	N/A	67992	10547	1277	0	13.0	211	100.0	96.7	46
83	1723	987	467	64	1052	38439	8572	11775	0	13.7	554	105.7	99.8	65
102	1338	457	581	33	1911	43310	0	0	2411	15.1	666	97.2	93.6	t28
na	na	na	na	na	na	na	na	na	na	na	na	94.5	93.4	t18
118	1022	368	708	30	1899	22400	7101	5003	93	13.7	433	100.3	101.9	t42
na	na	na	na	na	na	na	na	na	na	na	na	98.4	102.5	t35
179	1230	277	324	22	784	40174	3156	6970	3850	15.6	1390	108.1	101.7	69
150	1647	N/A	1352	N/A	N/A	25663	1995	0	20412	6.0	425	112.0	112.7	71
na	na	na	na	na	na	na	na	na	na	na	na	106.1	104.6	67
na	na	na	na	na	na	na	na	na	na	na	na	94.5	93.9	t18
N/A	89	N/A	243	N/A	N/A	150	53331	0	0	4.6	1016	96.6	97.2	t24
191	2209	1026	411	64	1123	57015	7429	0	764	13.0	502	103.2	98.0	58
45	4250	N/A	1289	N/A	N/A	18820	81056	0	0	12.8	991	93.8	89.9	13
0	2293	896	0	60	0	0	72646	0	0	14.9	1209	96.7	95.1	t25
66	1286	526	199	33	500	14977	54421	0	0	12.4	1261	96.1	94.8	22
120	2166	1418	322	95	746	25695	35878	410	0	12.2	435	96.6	97.4	t24
115	2410	N/A	881	N/A	N/A	26231	61869	0	0	12.4	1244	99.5	95.7	38

435	202,686
242	203,145
253	223,966

Source: Prepared especially for CCJ by Trinc Transportation Consultants, a division of Dun & Bradstreet, Washington, DC, from ICC motor carrier annual reports for 1982. —Operating revenue figure is derived from 1982 fourth quarter cumulative figures. Annual report was not available at closing time. [1]—BM—Building Materials, CM—Common, CT—Commodities, GF—General Freight, [illegible]—Explosives, and Dangerous articles, FP—Forest Products, HH—Household Goods, HM—Heavy Machinery, LP—Liquid Petroleum products (including in most cases other bulk commodities), MV—motor vehicles, RS—retail store delivery, SC—specific commodity not otherwise grouped. [2]—"d" following data indicates net loss (deficit) after taxes. [3]—as of Dec. 31, 1982. [4]—where only one figure appears, it represents total tonnage. [5]—predominately piggyback. [6]—"t" preceding data indicates tie for that rank. N/A—indicates not applicable. na—indicates data not available.

Rank		Fleet	Type[2]	Financial Data (÷000)			Owned Vehicles[4]			(÷000) Total Equip. Exp.
'82	'81			Gross Oper. Revenue	Expenses	Net Income after Taxes[5]	Trucks	Tractors	Trailers	
51	53	•Merchants Fast Motor Lines, Abilene, TX	CMGF	$98293	$88478	$4885	na	na	na	na
52	61	Thurston Motor Lines, Charlotte, NC	CMGF	97344	94422	1766d	358	705	2621	7523
53	59	Commercial Carriers Inc., Southfield, MI	CMMV	96084	92778	3414	0	1247	1379	12262
54	55	•Gordons Transports Inc., Memphis, TN	CMGF	95370	97252	4327d	na	na	na	na
55	51	Illinois-California Express, Denver, CO	CMGF	94602	96563	910	243	527	1791	6918
56	67	Red Star Express Lines, Auburn, NY	CMGF	88442	82115	2728	37	734	1230	6938
57	64	Transus Inc., Atlanta, GA	CMGF	86937	84636	1364	125	600	1271	5684
58	58	C W Transport Inc., Wisconsin Rapids, WI	CMGF	84474	87306	1075d	4	899	1943	6708
59	76	A-P-A Transport Corp., North Bergen, NJ	CMGF	81472	67549	6519	338	223	561	4672
60	62	•Riss International Corp., Kansas City, MO	CMGF	81116	82587	1247d	na	na	na	na
61	80	Nu-Car Carriers Inc., Bryn Mawr, PA	CMMV	79158	77301	240	0	691	843	8548
62	68	Murphy Motor Frt. Lines Inc., St. Paul, MN	CMGF	79048	80527	1336d	17	498	1631	3773
63	65	Campbell "66" Express, Springfield, MO	CMGF	78713	78649	88	50	648	1205	6142
64	70	•National Freight Inc., Vineland, NJ	CMGF	78146	79230	754	na	na	na	na
65	86	•CRST Inc., Cedar Rapids, IA	CMGF	71934	69626	2241	na	na	na	na
66	82	Milne Truck Lines, Salt Lake City, UT	CMGF	71322	74911	2277d	99	415	1312	3698
67	83	BN Transport Inc., Denver, CO	CMGF	68251	69946	922d	20	354	518	2764
68	106	•Lynden Transport Inc., Seattle, WA	CMGF	68238	61494	5778	na	na	na	na
69	77	Global Van Lines Inc., Anaheim, CA	CMHG	68197	67078	444	0	5	35	N/A
70	134	•Pennsylvania Truck Lines, Philadelphia, PA	CMGF	67266	64543	3086	na	na	na	na
71	71	Coastal Tank Lines Inc., Akron, OH	CMLP	66312	67022	3480d	0	352	845	6559
72	78	•Graves Truck Line Inc., Salina, KS	CMGF	65728	67045	1317d	na	na	na	na
73	92	•Midwestern Distribution, Ft. Scott, KS	CMFP	65301	69410	2515d	na	na	na	na
74	66	Commercial Lovelace Motor Frt., Columbus, OH	CMGF	64858	72470	6436d	22	458	1273	3515
75	103	Northwest Transpt. Service, Commerce City, CO	CMGF	62929	55971	3874	0	0	0	3602
76	73	Schwerman Trucking Co., Milwaukee, WI	CMSC	61071	61392	2462d	0	750	1849	7213
77	84	Midwest Coast Transport, Sioux Falls, SD	CMRS	60530	59093	660	0	5	304	430
78	74	System 99, Oakland, CA	CMGF	60122	60993	3962d	95	629	1306	3827
79	89	M & G Convoy Inc., Buffalo, NY	CMMV	59594	53461	120	0	685	771	7659
80	105	Crete Carrier Corp., Lincoln, NE	CMGF	59240	55712	2321	0	2	275	na
81	110	Churchill Truck Lines, Chillicothe, MO	CMGF	58571	57705	502	77	524	975	na
82	95	Holland Motor Express Inc., Holland, MI	CMGF	57929	54628	2149	10	501	917	4889
83	88	Groendyke Transport Inc., Enid, OK	CMLP	57048	55021	1152	0	382	549	5691
84	94	Motor Convoy Inc., Atlanta, GA	CMMV	56071	56084	790d	0	87	126	4304
85	87	FFE Transptn. Services Inc., Dallas, TX	CMRS	55906	56222	124	0	0	527	2345
86	114	Poole Truck Line, Evergreen, AL	CMBM	55359	51831	830	0	844	1402	na
87	91	Chemical Express Carriers, Dallas, TX	CMSC	55146	53328	258d	0	817	1476	7304
88	143	•Mistletoe Exp. Serv., Oklahoma City, OK	CMGF	55053	53512	338	na	na	na	na
89	98	Shaw Willis Frozen Exp., Elm Springs, AR	CMRS	54890	51205	1902	0	223	453	2607
90	90	Santa Fe Trail Transptn., Wichita, KS	CMGF	54662	54551	431	32	483	498	3738
91	79	United Transport Inc., Oklahoma City, OK	CMMV	54273	56152	1872d	0	784	838	7858
92	101	Holmes Transptn. Inc., Framingham, MA	CMGF	54228	54221	341	113	387	1043	4317
93	100	Duff Truck Line Inc., Lima, OH	CMGF	53159	55134	2378d	12	314	1137	3852
94	128	AAA Cooper Transportation, Dothan, AL	CMGF	51101	50250	85	57	305	797	2598
95	135	Overland Express Inc., Blaine, MN	CMGF	50792	47718	1046	0	0	927	na
96	75	•R-W Service System, Taylor, MI	CMGF	50737	51225	1154d	na	na	na	na
97	108	Southeastern Freight Lines, Columbia, S.C.	CMGF	50654	47214	2980	125	562	935	na
98	107	Refiners Transpt. & Terminal, Oregon, OH	CMLP	50330	50354	2013d	3	313	642	5207
99	136	Oneida Motor Freight Inc., Carlstadt, NJ	CMGF	49975	50108	111	104	295	507	na
100	130	Advance Transportation Co., Milwaukee, WI	CMGF	49577	49181	448d	40	253	519	3093
		TOTAL TOP 100—1982		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
		TOTAL TOP 100—1981		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
		TOTAL TOP 100—1980		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Maintenance Data		Intercity Operating Data (+000)								Avg. Load (tons)	Avg. Haul (miles)	1982 Oper. Ratio	1981 Oper. Ratio	Rank By Oper. Ratio[7]
Avg. No. Maint. Emplys.	(+000) Tires & Tubes	Tons Carried[5]		No. of Shipments		Miles Operated								
						Owned Vehicles	Rented Vehicles		Rail & Water Miles[6]					
		TL	LTL	TL	LTL		With Drivers	Without Drivers						
na	$ na	na	na	na	na	na	na	na	na	na	na	90.0	88.3	5
168	1433	883	416	60	1076	35506	11108	0	0	11.6	418	97.0	93.8	27
129	1683	0	1723	0	157	43747	5812	0	0	5.5	158	96.6	95.6	t24
na	na	na	na	na	na	na	na	na	na	na	na	102.0	104.4	t54
104	945	357	242	24	696	29788	5215	6951	0	14.1	987	102.1	98.3	55
104	696	252	435	21	1143	13222	202	0	0	10.2	200	92.8	92.1	8
75	1007	563	429	39	1284	14960	15817	0	8029	11.0	524	97.4	93.4	t29
129	795	594	330	43	588	23803	3251	2600	203	12.4	403	103.4	94.5	59
48	558	73	344	7	1233	10852	0	0	0	6.4	166	82.9	84.0	1
na	na	na	na	na	na	na	na	na	na	na	na	101.8	98.3	52
77	1448	N/A	1506	N/A	N/A	29386	0	6017	0	6.8	160	97.7	95.0	t32
65	711	351	304	26	766	20567	4385	1767	182	11.9	491	101.9	99.6	53
101	868	264	331	21	694	29209	33	0	6	12.8	629	99.9	96.4	t40
na	na	na	na	na	na	na	na	na	na	na	na	101.4	99.4	t49
na	na	na	na	na	na	na	na	na	na	na	na	96.8	95.3	26
54	793	242	271	17	894	12346	2346	2502	1386	14.2	502	105.0	98.5	64
58	387	347	116	21	255	7145	17580	0	9980	16.1	1182	102.5	98.5	56
na	na	na	na	na	na	na	na	na	na	na	na	90.1	89.1	6
N/A	261	N/A	156	N/A	N/A	0	26838	0	0	4.0	694	98.4	97.2	t35
na	na	na	na	na	na	na	na	na	na	na	na	96.0	99.7	21
80	1156	N/A	3594	N/A	N/A	25641	10101	2028	0	12.2	128	101.1	94.6	48
na	na	na	na	na	na	na	na	na	na	na	na	102.0	101.4	t54
na	na	na	na	na	na	na	na	na	na	na	na	106.3	98.5	68
47	671	216	384	19	996	14993	0	0	0	10.0	250	111.7	105.8	70
31	874	185	204	12	628	0	769	16081	516	15.2	682	82.9	91.7	3
211	1827	N/A	5113	N/A	N/A	35566	6222	0	0	12.0	98	100.5	101.8	44
0	395	N/A	634	N/A	N/A	553	0	61547	0	18.5	1810	97.6	95.5	31
71	838	124	238	11	689	16482	0	1407	0	11.9	589	101.4	103.8	t49
84	924	629	10	67	1	23697	0	3828	0	5.2	224	99.8	93.2	t39
na	na	na	na	na	na	na	na	na	na	na	na	94.0	94.1	15
na	na	na	na	na	na	na	na	na	na	na	na	98.5	98.3	t36
51	707	221	328	20	694	13235	3	0	0	9.7	235	94.3	93.5	17
71	1135	N/A	3661	N/A	N/A	24021	274	21302	0	12.7	158	96.4	94.9	23
60	1228	2071	0	769	0	182	0	56288	0	N/A	N/A	100.0	96.9	t41
0	493	N/A	605	N/A	N/A	0	31333	0	0	N/A	N/A	100.6	102.8	45
na	na	na	na	na	na	na	na	na	na	na	na	93.6	90.5	12
126	1653	N/A	5520	N/A	N/A	36908	0	3471	0	13.0	102	96.7	98.5	t25
na	na	na	na	na	na	na	na	na	na	na	na	97.2	95.5	t26
39	702	N/A	549	N/A	N/A	18483	34387	0	0	17.8	1716	93.3	91.1	11
8	478	211	73	13	160	2104	2206	0	16686	11.5	1004	99.8	96.4	t39
115	1338	N/A	1146	N/A	N/A	30395	360	0	0	7.9	211	103.5	99.8	60
106	300	349	293	23	926	18573	78	13	0	5.2	152	100.0	97.8	t41
70	391	370	319	29	721	9489	714	2956	0	8.5	162	103.7	98.9	61
53	929	215	322	17	873	14743	984	0	1276	9.2	286	98.3	91.2	34
na	na	na	na	na	na	na	na	na	na	na	na	93.9	96.0	t14
na	na	na	na	na	na	na	na	na	na	na	na	101.0	99.6	47
na	na	na	na	na	na	na	na	na	na	na	na	93.2	92.7	10
73	1249	N/A	6274	N/A	N/A	24669	3112	479	0	13.5	61	100.0	91.5	t41
na	na	na	na	na	na	na	na	na	na	na	na	100.3	102.5	t42
41	190	293	285	22	704	5854	89	5363	0	8.7	170	99.2	96.7	t37
435	202,608													
242	203,145													
253	222,968													

Source: Prepared especially for CCJ by Trinc Transportation Consultants, a division of Dun & Bradstreet, Washington, DC, from ICC motor carrier annual reports for 1981. —Operating revenue figure is derived from 1982 fourth quarter cumulative figures. Annual report was not available at closing time. [2]—BM—Building Materials, CM—Common, CT—Contracts, GF—General Freight, ED—Explosives, and dangerous articles, FP—Forest Products, HG—Household Goods, HM—Heavy Machinery, LP—Liquid Petroleum products (including in most cases other bulk commodities), MV—motor vehicles, RS—retail store delivery, SC—specific commodity not otherwise grouped. [3]—"d" following data indicates net loss (deficit) after taxes. [4]—as of Dec. 31, 1982. [5]—where only one figure appears, it represents total tonnage. [6]—predominately piggyback. [7]—"t" preceding data indicates tie for that rank. N/A—indicates not applicable. na—indicates data not available.

For-hire carriers in CCJ's second 100 category didn't fare any better in 1982 then their bigger brothers. A recapitulation of the second 100 companies shows total losses of $45.2 million in 1982, compared with losses of $22,182,000 in 1981. Thirty-three companies in the second 100 lost money in 1982, compared with 19 losers in the previous year.

Looking at their operating ratios, Trinc's research shows that 28 had ORs in excess of 100, while another 26 actually improved their operating ratios.

The worst OR was reported by Bekins Moving & Storage Co. of Glendale, Calif., a shocking 154.6. Bekins is reportedly in the process of being acquired. By comparison, the best operating ratio was reported by J.B. Hunt Transport of Lowell, Ark., basically an owner operator company.

Pauls Trucking Corp., Cranford, N.J., made a significant improvement over 1981. Pauls is a distributor for a number of well-known discount stores and Pathmark Grocery chain. Pauls vaulted into the 102 position from 169 and earned $713,000 after taxes on revenues of $48.7 million. Pauls was also one of the 26 for-hire carriers that showed an improved, if only slight, operating ratio of 98.1 for '82, compared to 98.5 the previous year.

Some of the big money losers in the second 100 include Jones Transfer, Monroe, Mich., off $2 million; Hodges Trucking Co., Oklahoma City, down $4.5 million; Clairmont Transfer, Escanaba, Mich., down $2.6 million; and Malone Freight Lines, Birmingham, Ala., off $1.2 million.

Also reporting a loss last year was Schuster Express of Colchester, Conn., down by nearly $1.8 million. Owned and operated by more than four decades by Paul Schuster and family, the company was recently sold to Pilot Freight Lines of Winston-Salem, N.C.

Rank' '82	Fleet	Type	Financial Data (÷000)			1982 Oper. Ratio
			Gross Oper. Revenue	Expenses	Net Income after Taxes	
101	**Boutell F J Driveaway Co, Flint, MI**	**CMMV**	**$49387**	**48043**	**130**	**97.396.6**
102	**Pauls Trucking Corp., Cranford, NJ**	**CTGF**	**48783**	**47828**	**713**	**98.198.5**
103	**Miller Transporters Inc., Jackson, MS**	**CMLP**	**48716**	**47772**	**628d**	**98.193.9**
104	**Burnham Van Service, Columbus, GA**	**CMHG**	**48364**	**43440**	**2296**	**89.888.8**
105	**Sala Motor Freight Lines, Inc., Houma, LA**	**CMGF**	**48328**	**42985**	**3041**	**88.986.1**
106	Melton Truck Lines, Inc., Shreveport, LA	CMBM	48190	48627	21	100.998.8
107	•Mercury Motor Express Inc., Tampa, FL	CMGF	47806	50739	1469d	106.1101.1
108	Jones Transfer Co., Monroe, MI	CMGF	46960	48579	2080d	103.4100.6
109	Red Arrow Freight Lines Inc., San Antonio, TX	CMGF	46940	46487	751	99.096.6
110	C & J Commercial Driveaway, Lansing, MI	CMMV	45036	44088	276	97.997.9
111	**New Penn Motor Express, Lebanon, PA**	**CMGF**	**44831**	**38876**	**5955**	**86.785.2**
112	**Alterman Transport Lines, Opa-Lacka, FL**	**CMRS**	**44671**	**43671**	**266**	**97.896.4**
113	**•Anderson Trucking Service, St. Cloud, MN**	**CMSC**	**44160**	**42775**	**576**	**96.994.5**
114	**•Subler, Carl, Trucking Inc., Versailles, OH**	**CMSC**	**44128**	**44336**	**1256d**	**100.598.8**
115	**•Southwest Motor Freight, Chattanooga, TN**	**CMGF**	**43714**	**41870**	**36**	**95.898.9**
116	•Dart Transit Co., St. Paul, MN	CMGF	43394	39414	2062	90.893.1
117	•Tanksley, Sam Trucking, Cape Girardeau, MO	CMGF	42188	40404	1784	95.888.9
118	NTC of America Inc., Tulsa, OK	CMSC	42155	41331	280	98.0100.4
119	Sanborns Motor Express Inc., Portland, ME	CMGF	41913	40995	700	97.894.7
120	T.I.M.E.-DC, Lubbock, TX	CMGF	41751	47037	12188d	112.7104.4
121	**•Estes Express Lines, Richmond, VA**	**CMGF**	**41527**	**38970**	**1597**	**93.896.1**
122	**Schuster Express Inc., Colcester, CT**	**CMGF**	**41326**	**42236**	**1795d**	**102.497.6**
123	**•DSI Transport Inc., Houston, TX**	**CMSC**	**41195**	**38792**	**622**	**94.292.9**
124	**Ace-Doran Hauling & Rigging, Cincinnati, OH**	**CMSC**	**41158**	**39328**	**1242**	**95.696.6**
125	**Crouse Cartage Co., Carroll, IA**	**CMGF**	**41024**	**40406**	**620**	**98.599.3**
126	•Ruan Transport, Des Moines, IA	CMLP	40818	42811	1375d	104.9102.5
127	•National Carriers Inc., Liberal, KS	CMRS	40613	37368	2494	92.092.7
128	•E & L Transport Co., Dearborn, MI	CMMV	40565	40418	104	99.698.2
129	Hunt, J.B. Transport Inc., Lowell, AR	CMGF	40532	34463	4418	85.091.4
130	Hyman Freightways Inc., St. Paul, MN	CMGF	40434	39298	418	97.296.0
131	**Kenosha Auto Transport Co., Kenosha, WI**	**CMMV**	**40426**	**42216**	**696d**	**104.499.2**
132	**Warren Transport Inc., Waterloo, IA**	**CMHM**	**39745**	**37452**	**1105**	**94.292.0**
133	**Turner Bros. Trucking Co. Inc, Oklahoma City, OK**	**CMSC**	**39704**	**36564**	**1934**	**92.186.2**
134	**•Pre-Fab Transit Co., Farmer City, IL**	**CMBM**	**39661**	**38753**	**550**	**97.799.3**
135	**Clairmont Transfer Co., Escanaba, MI**	**CMGF**	**39093**	**40712**	**2652d**	**104.199.4**
136	•Hodges, Bill Trucking Co., Oklahoma City, OK	CMSC	39087	38142	4573d	97.681.4
137	•Dallas & Mavis Forwarding Co., South Bend, IN	CMMV	38799	38403	65	99.096.4
138	•Farmer, E. L. & Co., Odessa, TX	CMSC	38725	36257	1197	93.684.8
139	Colonial Refrigerated Trnsptn., Knoxville, TN	CMRS	38350	36088	875	94.194.2
140	•Malone Freight Lines, Inc., Birmingham, AL	CMGF	38340	39350	1254d	102.499.8
141	**Daily Exprss Inc., Carlisle, PA**	**CMSC**	**37875**	**35770**	**979**	**94.492.1**
142	**Lyons Transptn, Erie, PA**	**CMGF**	**37813**	**38036**	**166d**	**100.695.6**
143	**Morgan Drive-Away Inc., Elkhart, IN**	**CMSC**	**36800**	**34722**	**1058**	**94.496.3**
144	**Wilson Trucking Corp., Fishersville, VA**	**CMGF**	**36543**	**33276**	**1231**	**91.190.5**
145	**Home Transportation Co. Inc., Marietta, GA**	**CMSC**	**36210**	**35844**	**366**	**99.098.4**
146	•Getter Trucking Inc., Billings, MT	CMSC	35974	36705	78d	102.079.5
147	•Cassens Transport Co., Edwardsville, IL	CMMV	35469	35150	409	99.197.5
148	Pirkle Refrigerated Frt. Lines, De Forest, WI	CMSC	35304	32679	1360	92.694.1
149	Acme Truck Line, Inc., Harvey, LA	CMSC	35092	33579	1091	95.796.3
150	•North Penn Transfer Inc., Lansdale, PA	CMGF	34995	34678	311	99.199.8

Rank '82	Fleet	Type	Financial Data (÷000)			1982 Oper. Ratio
			Gross Oper. Revenue	Expenses	Net Income after Taxes	
151	**Jones Motor Co. Inc., Spring City, PA**	**CMGF**	**$34857**	**34759**	**$ 107**	**99.7100.8**
152	**•Gray, Jack Transport Inc., Gary, IN**	**CMOT**	**34842**	**34755**	**242d**	**99.798.1**
153	**Aero Trucking Inc., Monroeville, PA**	**CMSC**	**34577**	**34906**	**516d**	**101.0100.0**
154	**AAA Trucking Corp., Trenton, NJ**	**CMGF**	**34094**	**32925**	**616**	**96.994.6**
155	**Auto Convoy Co., Dallas, TX**	**CMMV**	**33712**	**34028**	**392d**	**100.999.3**
156	•Frederick Transport Ltd., Chatman, Ontario, CN	CMSC	33425	31966	899	95.6
157	•Fleet Transport Co., Inc., Nashville, TN	CMLP	33181	34164	545d	103.098.1
158	Convoy Co., Kirkland, WA	CMMV	32900	33158	173	100.8101.5
159	Carretta Trucking Inc., Paramus, NJ	CMGF	32739	29783	1984	91.091.4
160	•DiSalvo Trucking Co., San Francisco, CA	CMGF	32605	32032	165	98.297.6
161	**•Standard Trucking Co., Charlotte, NC**	**CMGF**	**32531**	**36161**	**143d**	**98.997.0**
162	**Superior Trucking Co., Inc., Atlanta, GA**	**CMHM**	**32058**	**31452**	**259**	**98.198.0**
163	**•Wheaton Van Lines Inc., Indianapolis, IN**	**CMHG**	**31895**	**30681**	**911**	**96.896.5**
164	**•Willig Freight Lines, San Francisco, CA**	**CMGF**	**31822**	**29664**	**1295**	**93.289.7**
165	**•Chem-Haulers Inc., Florence, AL**	**CMSC**	**31584**	**32603**	**1046d**	**103.296.7**
166	George Transfer & Rigging Co., Parkton, MD	CMSC	31552	31981	1210	101.497.5
167	•Curtis Inc., Commerce City, CO	CMRS	31480	31158	171	99.099.9
168	•Mushroom Transptn. Co., Inc., Philadelphia, PA	CMGF	31404	31718	1990d	101.097.8
169	Penn Yann Express, Inc., Penn Yann, NY	CMGF	31174	31040	723d	99.699.3
170	•Sammons Trucking, Missoula, MT	CMBM	30810	29774	444	96.694.8
171	**Janesville Auto Transport, Janesville, WI**	**CTMV**	**30707**	**30573**	**412**	**99.695.6**
172	**Waggoners Trucking, Billings, MT**	**CMGF**	**30661**	**30602**	**163**	**99.896.6**
173	**Texas Oklahoma Express, Irving, TX**	**CMGF**	**30602**	**31360**	**411d**	**102.594.9**
174	**Commercial Carrier Corp., Auburndale, FL**	**CMBM**	**30564**	**28864**	**372**	**94.494.9**
175	**McKenzie Tank Lines, Tallahassee, FL**	**CMLP**	**30381**	**28745**	**1276**	**94.687.2**
176	O K Trucking Co., Cincinnati, OH	CMGF	30338	30430	867d	100.398.0
177	•Truck Transport Inc., St. Louis, MO	CMSC	30294	29595	10	97.796.9
178	Associated Petroleum Carriers, Spartanburg, SC	CMLP	30267	30415	320	100.598.6
179	•McAdams, B. J. Inc., North Little Rock, AR	CMGF	30133	29253	222d	97.193.7
180	Deaton Inc., Birmingham, AL	CMSC	29932	27960	1128	93.492.2
181	**•Missouri Pacific Truck Lines, St. Louis, MO**	**CMGF**	**29920**	**30140**	**617**	**100.7100.8**
182	**•United Trucking Service Inc., Dearborn, MI**	**CMGF**	**29836**	**31139**	**1750d**	**104.4100.4**
183	**McClendon Glenn Trucking Co., Lafayette, AL**	**CMGF**	**29401**	**28115**	**72d**	**95.695.0**
184	**•Mitchell Transport Inc., Cleveland, OH**	**CMSC**	**29071**	**25969**	**778**	**89.386.2**
185	**•Indianhead Truck Line, St. Paul, MN**	**CMGF**	**28760**	**28506**	**345d**	**99.197.4**
186	Walker, B.F., Inc., Denver, CO	CMSC	28745	28551	237	99.392.3
187	Pilot Truck Lines, Jacksonville, FL	CMBM	28577	25391	857	88.889.6
188	B & L Motor Freight, Newark, OH	CMSC	27929	27827	19	99.6101.5
188	•Prime, Inc., Springfield, MO	CMGF	27929	28932	2210d	103.6100.7
189	A & H Truck Line, Inc., Evansville, IN	CMGF	27841	26915	596	96.794.9
190	**•Hyder Clay Trucking Lines, Auburndale, FL**	**CMAC**	**27644**	**24715**	**2272**	**89.491.9**
191	**•Bekins Moving & Storage Co.-CA, Glendale, CA**	**CMHG**	**27375**	**42309**	**941d**	**154.6112.7**
192	**Werner Enterprises, Omaha, NE**	**CMSC**	**27123**	**24177**	**2075**	**89.195.3**
193	**Gross & Hecht Trucking, Edison, NJ**	**LORS**	**26756**	**25115**	**634**	**93.994.8**
194	**Spartan Express Inc., Greer, SC**	**CMGF**	**26451**	**23759**	**423**	**89.890.2**
195	Miller Transfer & Rigging, Cuyahoga Falls, OH	CMHM	26210	26210	615d	98.696.8
196	•Florida Rock & Tank Lines, Jacksonville, FL	CMDT	26208	23964	458	91.492.6
197	•L.C.L. Transit Co., Green Bay, WI	CMSC	25751	26236	273d	101.9101.5
198	•Salt Creek Freightways, Casper, WY	CMGF	25485	27005	2145d	106.0101.1
199	Hirschbach Motor Lines, Sioux City, IA	CMAC	25125	25067	54	99.799.7
200	•American Red Ball Transit Co., Indianapolis, IN	CMHG	25006	24817	323d	99.297.4
	TOTALS		**$4,251,725**	**$4,093,909**	**$193,183**	

(Note: Net income total excludes two carriers without net figures reported—Cooper-Jarrett, No. 100 and Cannons Transport, No. 192.)

Significantly, some of the best run, best managed companies are in the second 100, but at the same time, they are also more sensitive to the changes in the marketplace and to the economic pressures around them. Schuster Express is a good example of that. So is Mushroom Transportation Co. of Philadelphia, a family owned carrier that lost nearly $2 million on revenues of $31.4 million. In addition, a number of carriers in the second 100 that showed improvement in operating ratios are also owner operator carriers. They include companies like Carretta Trucking, earning $1.9 million; Pirkle Refrigerated Freight Lines of Wisconsin, earning $1.3 million; Colonial Refrigerated Transportation of Knoxville, Tenn., $875,000.

Alterman Transport Lines of Opa Locka, Fla., although earning $266,000, increased its OR 1.4 points to 97.8.

Some owner operator companies also turned out to be heavy losers. These include Mercury Motor Express of Tampa, Fla., down $1.4 million with an escalating OR of 106.1, and Carl Subler Trucking of Versailles, Ohio, off $1.2 million and with a rising OR of 100.5.

Carriers that have gone out of business since June '82 include: Cooper-Jarrett of Orange, N.J.; Boss Linco Lines, Buffalo, N.Y.; and Chief Freight Lines of Tulsa, Okla.

Clearly, 1982 was not your typical year for the for-hire segment of the trucking industry. What 1983 will bring to the second 100 remains to be seen. But there is little doubt some carriers listed here will disappear by next year, victims of the recession, deregulation and/or bad management.

A new dawn is on the trucking horizon. For well managed firms, it holds the promise of a rewarding future. But for the poorly managed ones, it looms ominously dark.

INDUSTRY TRENDS AND STATISTICS

No one who is familiar with the current state of the trucking industry would argue the fact that our nation's recession has proven to be a profound depression for carriers of general commodities. Coupled with the depressed 1982 business environment was the continuing impact of deregulation legislation. Add to this, for 1983, the Surface Transportation Assistance Act. Understandably, many industry soothsayers are silent, for still to be determined is the future shape of an industry that was once the most stringently regulated in the country.

Despite all of this adversity and transition, it is still possible to get a handle on who does what in trucking. For example, based on 1981 figures, excluding revenues of $4.6 billion reported by United Parcel Service for that year, general freight carriers accounted for 59.9% of all revenues reported by the for-hire trucking industry. Of this figure, 53.2% represents revenues of intercity common carriers. The other 6.4% was accounted for by other general freight carriers. The remaining 40.4% of the revenue dollar was earned by specialized carriers, such as those hauling heavy machinery, liquid petroleum, refrigerated goods, car carriers and household goods carriers.

Information for *Industry Trends and Statistics* was compiled by *Commercial Carrier Journal's* editorial and marketing staffs from data supplied by Trinc Transportation Consultants, Inc., a company of the Dun and Bradstreet Corporation; the Motor Vehicle Manufacturers Association; and the Department of Commerce, Bureau of Census, Industry Division.

NUMBER OF FOR-HIRE CARRIERS

The Class I carrier group was enlarged by 52 new members in 1982. This growth is evidence that the merger/aquisition fever is continuing. Also, the total number of for-hire carriers in existence at the end of 1982 was greater than ever before, with 85% of them in the Class 3 ranks (gross annual revenues of less than $1 million).

Year	Class I (Over $5 Million")	Class II ($1-$5 Million)	Class III (Under $1 Million*)	TOTAL
1982	1,083	2,279	19,051	22,413
1981	1,031	2,293	*	18,000*
1980	947	2,164	*	17,000*
1979	992	2,754	13,337	17,083
1978	1,045	2,929	12,900	16,874
1977	1,052	3,101	12,453	16,606
1976	899	2,589	12,984	16,472

* Class III for-hire carriers are not required to report financial operating data to the Interstate Commerce Commission as are most Class I and Class II for-hire carriers. Consequently, a reliable count of the number of Class III carriers in existence is difficult to obtain. The Class III total given above, for 1982, was supplied by the American Trucking Associations, Inc., and is said to be current as of November 1982.

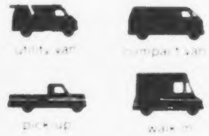
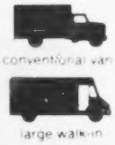
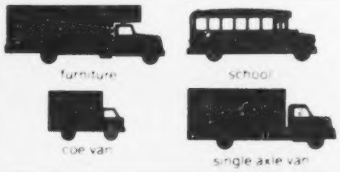
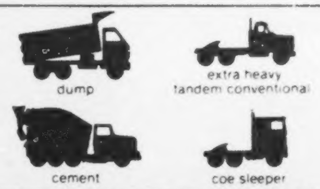
SELECTED FINANCIAL DATA FROM CLASS I AND CLASS II COMMON CARRIERS

Class I and Class II carriers, the *creme de la creme* of the trucking industry, went financially sour in 1982. Combined Gross Operating Revenues for the 686 reporting carriers fell 3.8% ($1.024 billion) while Total Operating Expenses dropped 2% ($527.1 million), but Net Income After Taxes plummeted 56.8% ($417.2 milion) from reported 1981 levels, which were artificially inflated by the massive tax write-offs of operating authority.

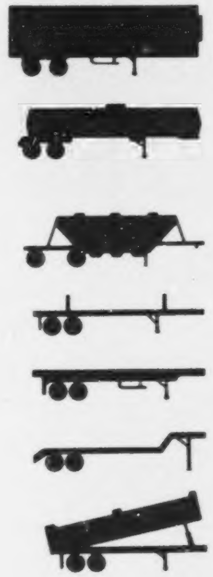
All $ Figures Add 000	1981	1982
Number of Carriers	674	686
Gross Operating Revenues	26,688,513	25,664,596
Salaries, Wages & Fringe Benefits	13,835,803	13,723,235
Operating Supplies & Expenses	3,358,259	3,103,593
General Supplies & Expenses	686,854	911,588
Operating Taxes & Licenses	567,255	573,701
Insurance	558,774	516,614
Communications & Utilities	386,580	436,998
Depreciation & Amortization	917,024	929,188
Equipent Rental & Purchased Trnsptn.	4,580,410	4,281,803
Building & Office Equipment Rental	277,332	305,112
Other & Miscellaneous Expenses	72,489	113,880
Total Operating Expenses	25,422,812	24,895,704
Net income before taxes	1,147,030	642,140
Net income after Taxes	734,004	316,818
Operating Ratio (%)	95.3	97.0

The information in this table was prepared especially for *Commercial Carrier Journal* by Trinc Transportation Consultants, Inc., from *Trinc's Red Book of the Trucking Industry*, 1982 edition. Financial data is based on reports filed with the ICC by Class I and II "instruction 27" carriers (75% of revenue derived from general commodity freight) required to file Quarterly Financial Reports with the ICC. Contract carriers and household movers are excluded. Figures for 1981 are restated on the basis of those carriers filing 1982 returns. Effective January 1, 1982, the ICC relieved all Class I contract carriers and all Class II carriers, except "instruction 27" carriers from filing quarterly reports.

FACTORY SALES OF TRUCKS BY GVW (1938 through 1982)

utility van compact van pick-up multi-purpose	CLASS 1 6,000 lbs. & Less	No. of Units 15,994,754	% of Total 48.0
 utility van compact van pick-up walk-in	CLASS 2 6,001-10,000 lbs.	No. of Units 12,577,614	% of Total 37.7
milk bread walk-in compact van	CLASS 3 10,001-14,000 lbs.	No. of Units 283,294	% of Total .8
 conventional van large walk-in	CLASS 4 14,001-16,000 lbs.	No. of Units 75,819	% of Total .2
rack tree specialist large walk-in	CLASS 5 16,001-19,500 lbs.	No. of Units 321,605	% of Total 1.0
 furniture school coe van single axle van	CLASS 6 19,501-26,000 lbs.	No. of Units 1,881,032	% of Total 5.6
home fuel transit trash medium conventional	CLASS 7 26,001-33,000 lbs.	No. of Units 535,809	% of Total 1.6
 dump extra heavy tandem conventional cement coe sleeper	CLASS 8 33,001 lbs. & Over	No. of Units 1,711,867	% of Total 5.1
Source: Motor Vehicle Mfrs. Assn. and CCJ Marketing Dept.	TOTAL	33,381,794	100.0

BREAKDOWN OF NEW TRAILER SHIPMENTS (1968 through 1982)



	Number	% of Total
VANS		
Dry Freight/Closed Top	956,824	46.5
Dry Freight/Open Top	65,243	3.2
Insulated/Semi-Insulated	227,590	11.0
Drop Frame	61,825	3.1
Livestock	21,276	1.0
Total Vans	1,332,758	64.8
SPECIAL TYPES		
Tanks/Liquid	94,718	4.6
Dry Bulk	27,492	1.3
Pole and Logging	23,162	1.1
Platform	336,199	16.4
Low-Bed	74,274	3.6
Dump	92,317	4.5
All Others	75,024	3.7
Total Special Types	723,186	35.2
TOTAL COMPLETE TRAILERS	2,055,944	100.0
Detachable Trailers[1]	174,942	
Detachable Chassis[2]	204,178	
Dollies and Converter Gear[3]	53,496	

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly for converting semi-trailer into full trailer in twin trailer doubles operations.

Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

FACTORY SALES OF SPECIAL TYPE VEHICLES

Type of Vehicle	1982	1981	1980	1979	1978	1977	1976
Station Wagons[1]	467,922	587,665	425,113	662,154	901,539	969,468	904,666
Trucks with Cab-over Engine	33,157	32,551	43,587	72,504	70,260	71,062	48,699
Trucks with Diesel Engines	219,748	208,938	214,562	227,834	219,915	165,559	107,216
Trucks with 6 Wheels, 3 Axles	59,170	83,103	86,572	142,646	134,296	124,427	80,531
Buses, including School Bus Chassis	26,260	27,295	34,385	32,498	31,378	28,658	30,230
Multi-stop delivery trucks	31,793	25,979	23,148	45,395	73,447	52,573	49,473

1. Includes those built on both car and truck chassis. Source: Motor Vehicle Manufacturers Association

A 15-year analysis of truck factory sales indicates that light-duty Class I and Class II sales, dominated by pickups and vans, comprise 86% of the total truck market. The majority of the vehicles in these two classes are used for personal transportation, as a "second car," as recreational vehicles or as farm vehicles. The rest are commercial and fleet vehicles.

In the heavy-duty fleet market, Classes VI and VIII dominate. CCJ's *Census of the Motor Fleet Market* shows that 80% of all Class VII and VIII trucks are used in fleets of 10 or more vehicles. Class VIII includes all three-axle straight trucks and tractors, and some large two-axle trucks. Class VII is mostly two-axle trucks and most of the medium-duty two-axle tractors.

DOMESTIC TRUCK FACTORY SALES BY GVW

Table below shows trends in size groups over a period of years.

Year	6,000- & Less	6,001- 10,000 lb	10,001- 16,000 lb	16,001- 19,500 lb	19,501- 26,000 lb	26,001- 33,000 lb	Over 33,000 lb	Total Domestic
1982	869,897	744,350	10	1,333	22,533	48,568	68,040	1,754,731
1981	583,341	716,556	263	1,843	50,762	41,503	94,958	1,489,226
1980	547,426	679,532	4,827	1,761	50,124	48,728	99,711	1,432,109
1979	961,345	1,413,229	19,727	3,140	109,521	40,235	164,095	2,711,292
1978	1,246,650	1,779,565	39,432	3,736	122,437	36,871	155,579	3,384,270
1977	1,253,409	1,580,533	21,236	4,831	122,423	26,699	140,045	3,149,176

DOMESTIC DIESEL TRUCK SALES

Year	6,000- & Less	6,001- 10,000 lb	10,001- 16,000 lb	16,001- 19,500 lb	19,501- 26,000 lb	26,001- 33,000 lb	Over 33,000 lb	Total Domestic
1982	44,586	72,868	—	—	8,559	26,282	67,453	219,748
1981	47,789	20,393	—	—	19,336	27,651	93,769	208,938
1980	68,868	4,397	—	—	12,337	30,958	98,002	214,562
1979	31,894	653	—	—	14,404	23,121	157,762	227,834
1978	34,751	840	—	—	12,229	22,597	149,498	219,915
1977	2,386	975	—	—	11,142	15,695	135,361	165,559

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Make of Truck		Cat	Cummins	Detroit Diesel	IHC	Mack	All Other	Total
Chevrolet	1982	1,068	—	20,543	—	—	59,746	81,357
	1981	1,671	97	3,710	—	—	29,306	34,784
Chrysler	1982	—	—	—	—	—	49	49
	1981	—	—	—	—	—	—	—
Ford	1982	10,073	5,020	7,586	—	—	—	22,679
	1981	11,884	6,902	12,114	—	—	—	30,900
Freightliner	1982	1,385	5,129	472	—	—	—	6,986
	1981	1,843	6,434	1,108	—	—	—	9,385
GMC	1982	2,846	3,518	14,121	—	—	29,052	49,537
	1981	4,696	5,028	12,647	—	—	10,315	32,686
IHC	1982	1,323	14,993	2,205	14,312	—	3	32,836
	1981	2,533	21,405	4,734	18,333	—	433	47,438
Jeep Corp.	1982	—	—	—	—	—	3,264	3,264
	1981	—	—	—	—	—	3,428	3,428
Kenworth	1982	1,842	4,690	574	—	—	—	7,106
	1981	2,525	7,024	1,494	—	—	—	11,043
Mack	1982	670	837	214	—	13,733	86	15,540
	1981	450	749	333	—	18,801	226	20,559
Marmon Motor	1982	—	—	—	—	—	—	—
	1981	33	239	13	—	—	—	285
Mercedes-Benz	1982	—	—	—	—	—	2,036	2,036
	1981	—	—	—	—	—	2,039	2,039
Peterbilt	1982	1,983	3,300	294	—	—	—	5,577
	1981	2,392	4,557	866	—	—	—	7,815
Volkswagen	1982	—	—	—	—	—	5,020	5,020
	1981	—	—	—	—	—	29,867	29,867
White	1982	541	2,187	1,191	—	—	44	3963
	1981	468	3,325	734	—	—	—	4,527
Others	1982	79	239	333	—	—	—	651
	1981	464	547	943	—	—	4	1,958
Total	1982	21,810	39,913	47,533	14,312	13,733	99,300	236,601
	1981	28,959	56,307	38,696	18,333	18,801	75,618	236,714

Source: Motor Vehicle Manufacturers Assn. Reporting firms do not represent entire industry.
"All other" includes Chevrolet, Isuzu, Mercedes, Nissan, Olds, Scandia Vabis and Volkswagen.

TRUCK FACTORY SALES AND TRUCKS WITH DIESELS

Gross Vehicle Wt.	Year Sales and Diesel Engine	Chevrolet	GMC	Chrysler	Ford	Freight-liner	Inter-national	Jeep Corp.	AM General	Kenworth	Mack	Marmon Motors	Diamond Reo	Peterbilt	Volkswagen of America	White	Others	Total Trucks
Under	Sales—1982	407,221	100,618	86,430	230,839	—	—	37,503	—	—	—	—	—	—	7,286	—	—	869,897
6,000	w/Diesel—1982	27,021	12,678	—	—	—	—	—	—	—	—	—	—	—	4,867	—	—	44,566
lbs	Sales—1981	288,419	61,960	22,351	137,380	—	—	36,910	—	—	—	—	—	—	36,321	—	—	583,341
	w/Diesel—1981	13,332	5,315	—	—	—	—	—	—	—	—	—	—	—	29,142	—	—	47,789
6,001	Sales—1982	222,835	63,700	22,605	405,761	—	4	29,442	—	—	—	—	—	—	—	—	3	744,350
to	w/Diesel—1982	49,931	22,936	—	—	—	1	—	—	—	—	—	—	—	—	—	—	72,868
10,000	Sales—1981	201,482	48,802	57,520	383,202	—	1,026	24,521	—	—	—	—	—	—	—	—	3	716,556
lbs.	w/Diesel—1981	15,255	4,763	—	—	—	375	—	—	—	—	—	—	—	—	—	—	20,393
10,001	Sales—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
to	w/Diesel—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
14,000	Sales—1981	—	—	248	—	—	—	—	—	—	—	—	—	—	—	—	—	248
lbs	w/Diesel—1981	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
14,001	Sales—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	10	10
to	w/Diesel—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
16,000	Sales—1981	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	15	15
lbs	w/Diesel—1981	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
16,001	Sales—1982	319	1,000	—	—	—	—	—	—	—	—	—	—	—	—	—	14	1,333
to	w/Diesel—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
19,500	Sales—1981	695	1,128	—	—	—	—	—	—	—	—	—	—	—	—	—	20	1,843
lbs	w/Diesel—1981	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
19,501	Sales—1982	3,245	2,881	—	6,562	—	8,470	—	—	—	—	—	1,375	—	—	—	—	22,533
to	w/Diesel—1982	418	886	—	1,032	—	4,848	—	—	—	—	—	1,375	—	—	—	—	8,559
26,000	Sales—1981	14,811	15,733	—	9,687	—	9,012	—	—	—	—	—	1,519	—	—	—	—	50,762
lbs	w/Diesel—1981	4,304	7,720	—	1,575	—	4,218	—	—	—	—	—	1,519	—	—	—	—	19,336
26,001	Sales—1982	6,692	12,504	—	19,961	—	8,749	—	—	—	—	—	661	—	—	—	1	48,568
to	w/Diesel—1982	2,150	4,334	—	11,010	—	8,126	—	—	—	—	—	661	—	—	—	1	26,282
33,000	Sales—1981	—	730	—	25,753	—	14,489	—	—	—	—	2	520	—	—	—	9	41,503
lbs	w/Diesel—1981	—	722	—	14,064	—	12,334	—	—	—	—	2	520	—	—	—	9	27,651
33,001	Sales—1982	590	6,988	—	8,353	6,986	16,301	—	—	6,337	12,765	—	—	5,406	—	3,776	538	68,040
lbs	w/Diesel—1982	341	6,854	—	8,156	6,986	16,294	—	—	6,337	12,765	—	—	5,406	—	3,776	538	67,453
and	Sales—1981	1,249	12,007	—	10,153	9,329	22,302	—	—	10,036	16,473	252	—	7,326	—	3,969	1,862	94,958
over	w/Diesel—1981	675	11,707	—	9,856	9,329	22,285	—	—	10,036	16,473	252	—	7,326	—	3,969	1,861	93,769
Total	Sales—1982	640,902	187,691	109,035	671,476	6,986	33,524	66,945	—	6,337	12,765	—	2,036	5,406	7,286	3,776	566	1,754,731
Total	w/Diesel—1982	79,861	47,688	—	20,198	6,986	29,269	—	—	6,337	12,765	—	2,036	5,406	4,867	3,776	539	219,748
Total	Sales—1981	506,656	140,360	80,119	566,175	9,329	46,829	61,431	—	10,036	16,473	254	2,039	7,326	36,321	3,969	1,909	1,489,226
Total	w/Diesel—1981	33,566	30,227	—	25,495	9,329	39,212	—	—	10,036	16,473	254	2,039	7,326	29,142	3,969	1,870	208,938

Source: Motor Vehicle Manufacturers Assn. Reporting firms do not represent entire industry and data is factory sales from U.S. plants only. Mack figures include Brockway; White includes Autocar and Western Star. Others include Crane Carrier, Divco, Duplex, Hendrickson, Oshkosh, Walter, Flexible and trucks shipped by Freightliner to Consolidated Freightways.

In 1982, total truck factory sales were up 17.8% compared to 1981 figures, an increase of 265,505 units, but most of this increase was in the light-duty range (less than 10,000-lb GVW). Forty-nine percent of all medium-duty vehicles sold in 1982 are diesel powered.

Class VI (19,501- to 26,000-lb GVW) sales dropped 55.6%. The 1982 dieselization rate in Class VI is 38%, the same as 1981.

Class VII (26,000- to 33,000-lb GVW) factory sales were up 17%, but the Class VII rate of dieselization dropped to 54.1%, a dip of 12.5%. This was caused by the reclassification into Class VII of some Class VI gasoline-powered trucks by at least one manufacturer, according to the MVMA, such as GMC with its model C7D042 straight truck.

Sales of Class VIII trucks (heavier than 33,000-lb GVW) were 28.3% lower than 1981 levels, but the dieselization rate is up .4%, to 99.1% from the 1981 rate of 98.7%.

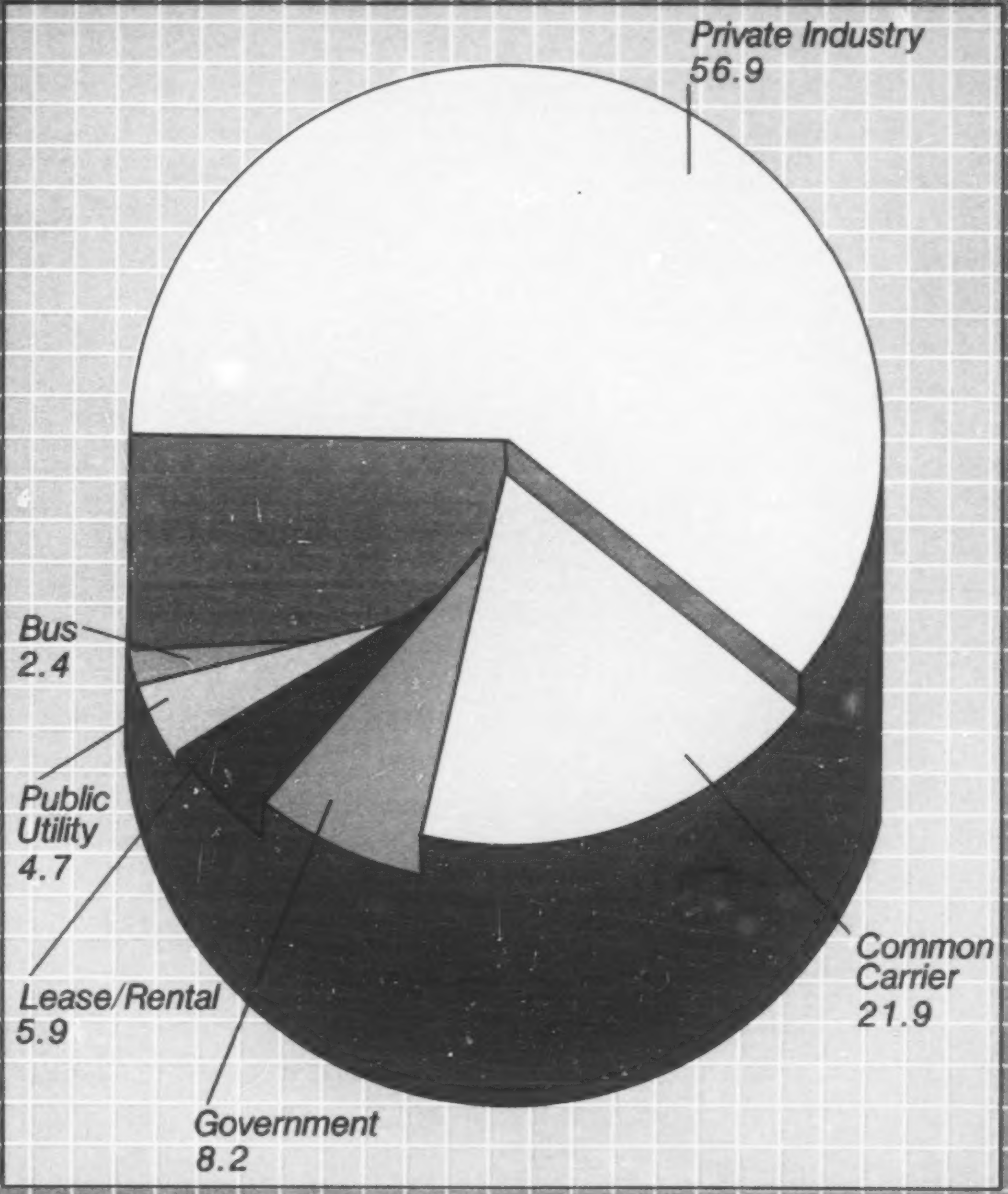
A lot of companies make money forecasting factory sales of vehicles. The problem today is, few are able to do this with any accuracy. For example, the Automotive Market Research Council missed the mark for factory sales of Class VIII trucks by +71% last year. Data Resources, Inc., was off by -50.6%. Their predictions varied by a 124% spread. In fairness to both of these highly regarded institutions, these are not the easiest times within which truck industry market analysts could operate. Indeed, there hasn't been a more fickle period, one more inundated with market forecasting variables, in the truck industry's history.

One forecaster, Jack Klock, an automotive and truck market analyst for 32 years, who was previously a research mathematician and is now chairman of Klock Advertising, has rolled out some pretty good figures during these tenuous times. He missed the 1982 Class VIII factory sales mark last year by only -311 units; that's -0.41%. His 1981 forecast missed by +0.21%; 1980 was off +1.37%. A pretty decent track record against some distinguished competition.

Klock predicts that 1983 factory sales of Class 8 trucks will be 82,354 units.

PRIVATE FLEETS

THE DOMINANT ROLE IN U.S. TRUCKING



PRIVATE FLEETS

By **RICH CROSS**, *Senior Editor*

CCJ's May 1983 statistical analysis of the motor fleet industry illustrates private trucking's dominance over other fleet types in terms of total vehicles operated.

In these times of far-reaching change, private trucking has become as complex as it is huge. This complexity makes it difficult for fleet managers to compare their operations with other fleets, for instance, in terms of efficiency or cost per mile.

Responding to private fleet management's need for comparative data, the Private Truck Council of America, Inc. contracted with researchers at A.T. Kearney, Inc. for an on-going, in-depth private fleet cost study involving more than 300 private carriers across the country.

Recent findings of the study were unveiled to PTCA members in April 1983. Some of these findings are highlighted within this section.

For purposes of the PTCA-Kearney study, a "tractor-trailer fleet" is one where 80% or more of power units are tractors. The same percentage guideline is used to define a "straight truck/van fleet" while a "mixed fleet" is one which fails to fit into either of the previous categories. Data for calendar year 1982 is compared with data acquired for the last six months of 1981.

Kearney notes that lower fuel prices helped to hold the cost-per-mile index fairly steady during this 18-month period, while, in many instances, tighter management controls prevented private carrier operating costs from skyrocketing.

Interestingly, similar private fleet operations were found to differ sig-

Continued

STATISTICAL ANALYSIS OF THE TRUCK INDUSTRY PRIVATE AND COMMON CARRIAGE

FLEET SIZE	TOTAL FLEETS	TOTAL VEHICLES	# OF STRAIGHT TRUCKS OPERATED	# OF TRACTORS OPERATED	# OF TRAILERS OPERATED	# OF BUSES OPERATED	# OF OFF-HIGHWAY VEHICLES OPERATED
500 & over	4053	10,014,046	3,412,972	899,705	2,034,721	478,024	460,247
100—499	14,344	2,631,893	862,405	334,165	608,406	139,254	222,022
50—99	14,798	934,156	314,150	122,002	212,790	62,035	96,860
25—49	21,769	711,829	271,719	86,504	140,035	46,429	70,477
10—24	22,790	373,422	169,598	43,818	62,078	22,098	30,157
TOTAL	**77,754**	**14,665,346**	**5,030,844**	**1,486,194**	**3,058,030**	**747,840**	**879,763**
VOCATION OR BUSINESS							
Common/ Contract	17,080	1,947,729	243,443	448,947	1,063,550	9,467	35,098
Lease/ Rental	4,565	3,366,603	966,504	371,586	747,287	9,761	34,652
Food Industry	9,414	1,044,752	397,931	151,983	288,258	8,705	45,664
Local,State & Federal Government	6,352	2,884,124	1,281,599	131,97	234,536	148,552	353,879
Construction/ Mining	11,665	756,942	309,663	53,576	99,179	3,318	200,260
Manufacturing/ Processing	7,627	1,118,181	314,612	159,149	223,324	6,293	77,701
Petroleum	3,307	336,904	135,052	42,802	61,837	549	14,863
Public Utility	3,664	1,360,052	810,559	14,067	83,462	6,701	61,143
Retail/ Wholesale Delivery	6,283	683,785	281,996	70,693	131,724	5,451	28,141
Services & Unclassified	2,479	501,475	224,298	37,877	119,647	18,984	17,498
Schools	3,436	359,177	54,648	2,132	3,964	256,145	8,846
Bus/Taxi	1,882	305,622	10,539	1,412	1,262	273,914	2,018
TOTAL	**77,754**	**14,665,346**	**5,030,844**	**1,486,194**	**3,058,030**	**747,840**	**879,763**

*Private and for-hire
†. Includes passenger cars
Source: CCJ Census of the Motor Fleet Market, May 1983

nificantly in their degree of performance, vehicle utilization and overall productivity.

Kearney principal, Michael P. Lipman, estimates that between $20 and $25 billion in cost savings are available to private carriage via improvements in their operation. "Private fleets have an opportunity to reduce their operating costs by up to 15%," Lipman says.

For a fleet to gauge its current effectiveness in controlling specific costs, it is necessary to have accurate, benchmark figures as a basis for comparison. The PTCA-Kearney study, although through a limited number of respondents, provides these figures in superb detail.

To obtain a copy of the complete study, contact PTCA at 1101 Seventeenth St. N.W., Washington, D.C. 20036. The cost is $40 to members, $75 to non-members.

In addition to PTCA-Kearney charts, this section lists some of the nation's largest private truck fleets, grouped by vocational category. Data in these lists has been acquired and verified by CCJ within 60 days, unless otherwise noted.

The fleets included in CCJ's study are representative of large private fleets. And the list is not all-inclusive. This is because many private companies consider information about fleet size and the cost to operate their fleet to be proprietary. Further, some highly-diversified corporations simply don't know how many trucks they collectively own or lease, because the fleet is scattered and controlled locally by multiple independent divisions.

A third study of truck fleets, completed in August of 1982 by Chilton Research Services for Rollins Leasing Corp., Wilmington, Del., includes data from 1150 companies operating a fleet of commercial vehicles. Some findings of this study are:

(1) These private fleets transport 75% of their companies' products. And almost half (43%) of these respondents expect the percentage to progressively increase over the next five years.

(2) Fully 70% of all respondents perform their own vehicle maintenance, 13% farm it out to an independent service facility, 10% depend on their leasing company for maintenance, and the remaining 7% have maintenance performed by truck dealers.

Among operators who lease their fleets, only 9% perform their own maintenance, and 83% leave the job to their leasing company.

(3) Of the respondents, 43% employ only union drivers, 53% employ only non-union drivers, while the rest lease their drivers.

(4) An average of 26% of all motor fuel consumed by respondents is purchased on the road, while approximately 72% is drawn from on-site bulk storage, and 2% is supplied by leasing companies.

(5) Slightly less than one-third of respondents rent vehicles. Of this group, 42% say they rent primarily because of vehicle breakdowns, 29% say they rent only when extra equipment is needed, and 26% traditionally rent on a seasonal basis.

Of all those who rent, 78% normally rent tractors, 64% rent trailers and 28% have occasion to rent straight trucks.

(6) Less than four out of 10 respondents (38%) say they're involved in intercorporate hauling. Slightly more than half of this group (53%) operate the fleet as a separate transportation subsidiary.

(7) About 40% of the respondents use one or two contract carriers on a regular basis; 20% use three or four contract carriers; 29% use five or more.

(8) Among those using contract carriers, 56% claim they do so primarily because of lower rates, while 58% cite better service as the prime motivation. Specifically, 72% are of the opinion that contract carriage gives them more schedule reliability than common carriage. And 48% say the use of contract carriage results in fewer labor problems.

What's ahead for private trucking? Opportunity. The opportunity to expand the fleet's contribution to the overall corporate distribution system; the opportunity for innovative organizational restructuring to meet future needs of the company; the opportunity to add to the corporation's bottom line by taking advantage of new operating freedoms provided by deregulation which can mean fewer empty miles, backhauling for profit and greater operating efficiency.

TRACTOR/TRAILER DRIVER AND MECHANIC WAGE RATES (PTCA—A.T. KEARNEY)

Category	Company				Leased			
	Non-Union		Union		Non-Union		Union	
	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982
Driver Wage Per Hour	$8.61	$8.60	$9.77	$ 9.84	$ 8.90	$ 8.34	$10.73	$10.59
95% Confid. Interv.	±.63	±.51	±.61	±.49	±.81	±.62	±.60	±.83
Per Mile Single	.23	.23	.25	.26	.23	.23	.26	.25
95% Confid. Interv.	±.01	±.01	±.01	±.01	±.02	±.01	±.02	±.01
Team	.17	.16	.15	.15	.16	.14	.14	.14
95% Confid. Interv.	±.02	±.02	±.02	±.02	±.02	±.01	±.01	±.01
Mechanic	8.93	9.21	9.80	10.34	10.14	12.04	13.04	19.32
95% Confid. Interv.	±.67	±.57	±.69	±.61	±2.18	±4.26	±2.90	±6.20

OPERATING STATISTICS (PTCA—A. T. KEARNEY)

Description	Straight Truck/Van Dec. '81	Straight Truck/Van 1982	Mixed Fleet Dec. '81	Mixed Fleet 1982
Miles Driven	46,800,000*	145,200,000	35,300,000*	39,900,000
Average Miles/Trip	146	251	764	735
Number of Drivers	2,464	10,668	623	941
Miles Per Driver	29,300*	35,300	64,200*	56,300
Number of Tractors	134	843	410	539
Number of Straight Trucks/ Vans	2,636	10,021	204	499
Percent Total Empty Tractor Miles	30	36	22	22
Trailer to Tractor Ratio	2.1	2.1	2.2	2.1
Average Miles Per Tractor	55,300*	50,800	80,500*	77,400
Average Miles Per Straight Truck	N/A	26,500	N/A	24,600
Average Miles Per Van	N/A	12,400	N/A	11,900

*Statistic annualized.

OPERATING STATISTICS (PTCA — A. T. KEARNEY)

Description	Tractor/Trailer Dec. '81	Tractor/Trailer 1982
Miles Driven	726,600,000*	822,600,000
Average Miles/Trip	1,003	949
Number of Drivers	10,554	12,506
Miles Per Driver	79,400*	75,100
Number of Tractors	7,638	8,969
Number of Straight Trucks/Vans	229	173
Percent Total Empty Tractor Miles	22	24
Trailer to Tractor Ratio	2.3	2.4
Average Miles Per Tractor	100,300*	91,100
Average Tractor Age	N/A	3
Average Tractor M.P.G.	N/A	5.3
Power Units/Mechanic Ratio**	N/A	5.2
Union/Non-Union Fleets	89/84	117/121
Leased/Owned Equipment	103/58	127/91

* Statistic annualized.

** For companies who perform 90% or more of their own maintenance.

Petroleum	Headquarters	Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	Leased
Standard Oil of Indiana/Amoco	Chicago, IL	5000	900	1500	4000	100	11,500	NA	1
Ashland Oil	Ashland, KY	4820	1062	1754	2900	NA	10,536	NA	30
Phillips Petroleum	Bartlesville, OK	3553	296	1123	1575	1875	8422	75	21
Getty Refining (A)	Tulsa, OK	2600	100	125	1200	NA	4025	NA	NA
Petrolane, Inc. (B)	Longbeach, CA	2630	190	460	680	NA	3960	NA	25
Arco Oil & Gas	Dallas, TX	1300	50	300	1300	50	3000	65.8	0
Air Products & Chemicals	Allentown, PA	338	600	1247	520	264	2969	51	0
Texaco U.S.A.	Houston, TX	126	255	344	1134	875	2734	37.7	93
Keer McGee Corp.	Oklahoma City, OK	1500	75	75	700	0	2350	NA	30
Gulf Oil (A)	Houston, TX	136	361	446	1296	72	2311	(C)	(D)
Exxon Co. U.S.A. (A)	Houston, TX	378(B)	375	390	936	0	2079	104.2	0
Pargas Inc.	Waldorf, MD	1145	45	69	78	123	1760	NA	1
Mobil Oil Corp. (A)	Fairfax, VA	48	360	442	20	181	1051	27.1(G)	2
Pyrofax Gas Corp.	Houston, TX	800	6	75	55	0	936	10.5	75

(A) Marketing department only. (B) Includes service vehicles. (C) Trucks- 42 million; Cars- 40 million. (D) All cars are leased. All other equipment is owned. (G) Does not include car or off-highway operation. NA—Not available.

PRIVATE FLEET OPERATING COSTS (PTCA—A.T. KEARNEY)

Cost Category	Tractor/Trailer Cost Per Mile Dec. '81	 1982
General and Administrative	$ .08	$ .08
Drivers	.52	.52
Equipment	.66	.68
Total	**$1.25**	**$1.26**
Sample Size	173	239
95% Confidence Interval**	$1.19 to $1.31	$1.22 to $1.30

* Numbers may not add; they represent average costs for those companies that provided information for the category shown.

** With 95% confidence, the average will fall within the range shown.

PRIVATE FLEET OPERATING COSTS (PTCA—A.T. KEARNEY)

Cost Category	COST PER MILE Straight Truck/Van Dec. '81	 1982	 Mixed Fleet Dec. '81	 1982
General and Administrative	$ .20	$ .24	$ .15	$ .11
Drivers	1.32	1.43	.69	.91
Equipment	1.00	.80	.74	.73
Total*	**$2.53**	**$2.37**	**$1.50**	**$1.67**
Sample Size	10	15	26	35
95% Confidence Interval	$1.57 to $3.49	$1.53 to $3.21	$1.17 to $1.83	$1.30 to $2.04

* Numbers may not add; they represent average costs for those companies that provided information for the category shown.

[illegible]	Headquarters	Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	[illegible]
Quality Bakers Corp. of America (F)	Greenwich, CT	14,500	8500	9100	1800	NA	33,900	NA	.02
ARA Services (A)	Philadelphia, PA	12,700	2800	2000	600	1200	19,300	500	0
ITT Continental Baking	Rye, NY	9080	600	720	400	NA	10,800	180.0	60
The W. E. Long Co.(F)	Chicago,IL	8000	800	1000	1000	NA	10,800	160.0	20
Safeway Stores	Oakland, CA	19	2173	4450	970	250	7862	116.2	0
Campbell Taggart	Dallas, TX	4965	622	769	612	NA	6968	120	3
Pepsi Cola Bottling Group	Purchase, NY	1862(E)	1406	1675	479	739	6161	67.6	12
Agway, Inc.	Syracuse, NY	3900	212	1005	0	149	5266	110.0	0
Interstate Brands	Kansas City, MO	4007	394	494	4	0	4899	98.5	0
Carnation Co.	Los Angeles, CA	1052	465	845	1400	1087	4849	NA	NA
American Bakeries	Chicago, IL	3000	276	400	54	NA	3730	13.1	30
The Kroger Co. (B)	Cincinnati, OH	0	959	2701	0	66	3726	92	0
Winn Dixie Stores	Jacksonville, FL	0	1100	1900	460	NA	3460	50	0
Dairymen, Inc.	Louisville, KY	1818	326	749	434	NA	3327	NA	NA
General Mills, Inc.	Minneapolis, MN	600	300	500	1700	NA	3100	6.3	10
The Pillsbury Co.	Minneapolis, MN	21	215	273	1800	0	2309	56.5	5
Holly Farms Poultry	Wilkesboro, NC	270	353	633	408	317	1922	37.5	NA
Southern States Coop, Inc.	Richmond, VA	1250	55	120	130	10	1565	20	0
Oscar Mayer Foods Corp.	Madison, WI	206	57	124	962	65	1424	NA	62
Acme Markets	Philadelphia, PA	21	250	798	250	0	1319	13.0	0
Entenmann's, Inc.	Bay Shore, NY	925	50	100	200	5	1280	30	.5
Giant Food, Inc.	Landover, MD	194	170	879	32	0	1275	11.5	0
Houston Coca Cola Bottling Co.	Houston,TX	614	114	176	182	151	1237	9.0	0
CFS Continental	Chicago, IL	425	309	383	0	0	1117	23.5	21
Sunshine Biscuits	New York, NY	250	25	50	650	0	975	18	0
Continental Grain Co. (C)	Chicago, IL	250	150	200	350	20	970	20	0
Geo. A. Hormel Co.	Austin, MN	131	13	13	675	8	827	26.4	62
Vons Grocery Co.	Elmonte, CA	40	227	543	1	9	820	11.4	8
Stop & Shop Co., Inc.	Boston, MA	2	150	491	95	NA	738	14.6	20
Super Food Services,Inc.	Dayton, OH	2	155	358	202	6	723	17.0	40
Sweet Life Foods, Inc.	Suffield, CT	7	138	280	278	8	711	14.1	20
Drake Bakeries	Wayne, NJ	615	17	35	30	0	697	9.5	0
Certified Grocers of Calif.	Los Angeles, CA	31	421	893	226	NA	678	26.2	40
Red Owl Stores	Hopkins, MN	0	200	440	0	0	640	9.75	30
The Bachman Co.	Reading, PA	412	24	83	30	NA	549	2.5	(D)
Marigold Foods, Inc.	Minneapolis, MN	209	84	154	97	NA	544	8	31

(A) Includes Smith's Transfer, magazine and book division and school bus operations. (B) Distribution fleet only. (C) Industrial Services Group only. (D) All tractors are leased; all other equipment is owned. (E) Includes pickups and miscellaneous other highway vehicles. (F) Cooperative association comprised of independent member companies. NA—Not available.

[illegible]	[illegible]	[illegible]	Tractors	[illegible]	[illegible]	[illegible]	[illegible]
Hertz Corp.	New York, NY	25,000	(A)	4000	290,000	NA	323,000
Gelco Leasing	Minneapolis, MN	50,000	8000	38,000	140,000	NA	236,000
Leaseway Transportation	Cleveland, OH	15,300	10,400	19,900	28,300	4500	78,400
Ryder System, Inc.	Miami, FL	30,000	24,000	18,000	0	0	72,000
Automotive Rentals, Inc.	Maple Shade, NJ	15,260	250	450	35,500	0	51,450
Nationalease	Chicago, IL	30,000	(A)	15,000	NA	NA	45,000
Lend Lease	Minneapolis, MN	4100	(A)	NA	40,000	NA	44,100
Jartran Truck Rental	Coral Gables, FL	11,000	O	19,000(C)	O	O	30,000
Ruan Leasing Co. (D)	Des Moines, IA	500	4047	3170	1000	NA	8717
Saunders Leasing System (E)	Birmingham, AL	1400	4000	3000	O	O	8400
Rollins Leasing Corp.	Wilmington, DE	1450(B)	3800	1750	200	0	7200

(A) Included in "Trucks" total. (C) Utility trailers only. (D) Includes Ruan Transport vehicles. (E) Does not include service fleet. NA—Not available.

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Off [illegible]	Total [illegible]	[illegible] Mileage [illegible]	[illegible]
Honeywell, Inc.	Minneapolis, MN	2302	0	0	6622	NA	8924	NA	100
Waste Management, Inc.	Oakbrook, IL	3486	316	552	768	892	7529(A)	NA	NA
Goodyear Tire & Rubber	Akron, OH	3226	88	92	2048	35	5489	NA	0
St. Regis Paper Co.	New York, NY	1075	280	570	750	1775(C)	4450	NA	100
Montgomery Ward & Co.	Chicago, IL	2500	265	1260	300	NA	4325	70	100
Crown Zellerbach Corp.	San Francisco, CA	790	414	1035	1045	10	3284	60	.1
Reynolds Electrical Engineering	Las Vegas, NV	2235	102	295	406	NA	3038	26	0
Diebold, Inc.	Canton, OH	1600	0	0	1100	0	2700	NA	99
Pfizer, Inc.	New York, NY	145	0	0	2194	NA	2339	62	86
Brown & Williamson	Louisville, KY	493	2	4	1151	NA	1650	35	0
American Greetings	Cleveland, OH	50	25	60	1450	2	1587	25	86
Texas Industries, Inc.	Dallas, TX	480	150	150	425	200	1405	17	80
American Linen Supply	Minneapolis, MN	1139	10	16	205	5	1359	19.1	0
Terminix International	Memphis, TN	948	0	0	395	0	1343	20	100
Safety-Kleen	Elgin, IL	1205	30	35	64	0	1334	42.5	80
TG & Y Stores Co.	Oklahoma City, OK	93	253	761	200	0	1307	39	93
Davey Tree Expert Co.	Kent, OH	1065	2	2	130	20	1219	NA	0(B)
Caterpillar Tractor Co.	Peoria, IL	282	125	228	481	0	1116	NA	95
Halliburton Services	Duncan, OK	252	171	400	106	NA	929	NA	0
Fisher Scientific Co.	Pittsburgh, PA	15	7	28	790	0	840	NA	99
Rite Aid Corp.	Harrisburg, PA	68	105	237	402	0	802	15	0
R. J. Reynolds Tobacco	Winston-Salem, NC	210	60	109	57	256	692	NA	0
Glasgow, Inc.	Glenside, PA	164	24	150	37	33	408	NA	0

(A) Includes 1618 vehicles classified as "other". (B) With exception of 124 leased cars. (C) Includes logging and construction vehicles. NA—Not available.

SINGLE SOURCE/TRIP LEASING AND TRANSPORTATION SUBSIDIARY (PTCA—A. T. KEARNEY)

	NUMBER OF RESPONDENTS					
Trucking Operation	Would Consider Single Source Leasing				Would Consider Trip Leasing	
	No. Dec. '81	No. 1982	% Total Dec. '81	% Total 1982	No. 1982	% Total 1982
Tractor/Trailer	106	136	62%	58%	160	68%
Mixed Fleet	12	16	50	44	18	49
Straight Truck/Van	1	3	9	15	2	10

	TRANSPORTATION SUBSIDIARY							
	Presently Have				Plan To			
	No. Dec. '81	No. 1982	% Total Dec. '81	% Total 1982	No. Dec. '81	No. 1982	% Total Dec. '81	% Total 1982
Tractor/Trailer	21	31	12%	13%	15	22	13%	11%
Mixed Fleet	1	3	4	8	3	5	15	15
Straight Truck/Van	0	1	0	5	1	1	14	5

[illegible]	Headquarters	Trucks(A)	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (Millions)	% Leased
American Tel.&Tel.	Basking Ridge, NJ	150,000	NA	NA	46,000	NA	196,000	NA	NA
GTE Corporation(B)	Stamford, CT	25,704(C)	168	725	8410	NA	35,007	380	8.0
Pacific Gas & Electric	San Francisco, CA	7554	80	2470	3200	77	13,304	NA	0
Georgia Power	Atlanta, GA	2805	30	1003	1802	391	6031	53	0
Southern California Gas	Los Angeles, CA	4032	30	240	1202	323	5827	42	100
Consumers Power Co.	Jackson, MI	3139	60	905	938	590	5632	46	90
General Public Utilities	Parsippany, NJ	2260	25	1103	1427	540	5355	41	90
Los Angeles Water & Power	Los Angeles, CA	2691	50	338	1121	922	5122	NA	0
Consolidated Edison	New York, NY	2760	27	54	1050	68	4500	33.2	0
Niagara Mohawk Power Corp.	Syracuse, NY	2575	30	1050	650	71	4376	40	75
Commonwealth Edison	Maywood, IL	1712	49	751	1690	158	4360	45	1
Florida Power & Light	Miami, FL	2880	50	770	450	50	4200	NA	1
Columbia Gas Distribution	Columbus, OH	2158	8	233	1034	270	3703	40	100
Long Island Lighting Co.	Mineola, NY	1439	11	469	932	441	3292	31	0
Detroit Edison	Detroit, MI	1056	60	693	471	196	2677	15	60
Philadelphia Electric	Philadelphia, PA	1418	22	437	755	23	2655	NA	70
ARKALA, Inc.	Shreveport, LA	1680	22	568	352	NA	2622	32	0
Illinois Power Co	Decatur, IL	1023	5	491	356	313	2257	12.9	0
Florida Power Corp. St.	Petersburg, FL	891	35	517	726	66	2235	23	15
Texas Power & Light Co.	Dallas, TX	340	5	400	700	750	2195	NA	NA
Union Electric	St. Louis, MO	650	15	250	475	600	1990	14	5
Appalachian Power Co.	Roanoke, VA	1040	7	244	435	139	1865	21.2	100
Carolina Power & Light Co.	Raleigh, NC	1053	10	300	520	NA	1860	24.6	0
Ohio Power Co.	Canton, OH	600	14	300	575	65	1554	16	100
Portland General Electric	Portland, OR	750	6	292	320	87	1455	NA	0
Potomac Electric Power Co.	Washington, DC	668	12	121	395	154	1350	12.9	80
Peoples Natural Gas Co.	Pittsburgh, PA	450	5	70	200	15	800	10	75
Northwest Natural Gas Co.	Portland, OR	450	10	55	165	120	800	6.4	0
Metropolitan Edison	Reading, PA	500	4	NA	210	40	754	7	90

(A) A few hundred tractors and trailers included. (B) Domestic fleet only. International operations include an additional 4500 vehicles. (C) Includes vans. NA—Not Available.

INTERCORPORATE AND TOTO AUTHORITY (PTCA—A. T. KEARNEY)

NUMBER OF RESPONDENTS

Trucking Operation	Participate in Intercorporate Hauling			
	No.		% Total	
	Dec. '81	1982	Dec. '81	1982
Tractor/Trailer	81	108	46%	45%
Mixed Fleet	9	12	33	32
Straight Truck/Van	3	1	25	5

TOTO AUTHORITY

	Presently Have				Applying For			
	No.		% Total		No.		% Total	
	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982
Tractor/Trailer	16	27	9%	11%	26	32	17%	16%
Mixed Fleet	1	2	4	5	3	7	12	19
Straight Truck/Van	0	0	0	0	1	1	8	5

TRACTOR/TRAILER DRIVERS (PTCA—A. T. KEARNEY)

COST PER MILE

Driver Category	General and Administrative Dec. '81	General and Administrative 1982	Drivers Dec. '81	Drivers 1982	Equipment Dec. '81	Equipment 1982	Total* Dec. '81	Total* 1982	95% Confidence Interval Dec. '81	95% Confidence Interval 1982
Company Non-Union	$ .08	$ .08	$ .45	$ .47	$ .63	$ .66	$1.16	$1.20	$ ± .06	$ ± .06
Company-Union	.08	.08	.56	.58	.70	.72	1.34	1.37	± .14	± .08
Leased Non-Union	.06	.07	.44	.42	.62	.62	1.11	1.10	± .05	± .06
Leased-Union	.10	.09	.63	.57	.67	.64	1.39	1.30	± .15	± .09

*Numbers may not add; they represent average costs for those companies that provided information for the category shown.

TRACTOR/TRAILER EQUIPMENT (PTCA—A. T. KEARNEY)

COST PER MILE

Type Equipment	General and Administrative Dec. '81	General and Administrative 1982	Drivers Dec. '81	Drivers 1982	Equipment Dec. '81	Equipment 1982	Total* Dec. '81	Total* 1982	95% Confidence Interval Dec. '81	95% Confidence Interval 1982
Owned	$ .08	$ .09	$ .51	$ .56	$ .61	$ .66	$1.19	$1.29	$ ± .08	$ ± .06
Leased	.08	.08	.52	.48	.69	.69	1.29	1.25	± .09	± .06
Mixed	.08	.07	.54	.52	.65	.65	1.26	1.24	± .19	± .14

Type Equipment	Average Miles Per Trip Dec. '81	Average Miles Per Trip 1982	Average Miles Per Driver Dec. '81	Average Miles Per Driver 1982	Average Miles Per Tractor Dec. '81	Average Miles Per Tractor 1982
Owned	816	662	74,900	65,900	83,900	77,400
Leased	1,127	1,181	82,300	81,100	109,700	101,800
Mixed	781	786	75,600	78,200	102,300	86,200

*Numbers may not add; they represent average costs for those companies that provided information for the category shown.

[illegible]	Trucks & Tractors	Cars & Station Wagons	Ambulances	Buses	Total Vehicles
U.S. Postal Service	107,915	10,060	0	NA	117,975
General Services Administration (A)	33,485	53,048	192	2991	89,716
Army	33,887	11,022	1086	3363	49,358
Air Force	35,588	5048	1071	2194	43,907
Navy	26,996	4256	635	1285	33,172
Agriculture Dept.	26,365	4630	0	53	31,056
Interior Dept.	12,460	2080	14	284	14,838
Justice Dept.	2456	1707	250	124	12,293
Department of Energy	9223	2016	62	289	11,590

(A) Most vehicles are in Interagency Motor Pool and rented or leased to other government fleets. There is no duplication with other fleets listed. * Source: General Services Administration Report, printed 1982. NA—Not available.

CITY GOVERNMENT*	Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
Columbus, OH	1137	34	153	1333	2113	4770	21	.04
Los Angeles, CA	2911	25	50	934	623	4543	47	.005
Atlanta, GA	811	103	96	1282(B)	2228	4520(C)	NA	0
Baltimore, MD	1375	7	13	1547	354	3289	NA	0
San Francisco, CA	815	30	15	1017	1254	3131	NA	0
Cincinnati, OH	1300	10	100	700	800	2910	NA	0
Kansas City, MO	1075	55	25	550	395	2100	NA	0
Tampa, FL	661	68	92	848	349	1928	12.9	.05
Portland, OR	252	10	40	910	72	1642(E)	NA	NA
Long Beach, CA	583	3	60	561	256	1463	10.4	0
San Diego, CA	900	2	50	300	225	1450(G)	NA	0
San Jose, CA	440	6	57	577(D)	288	1368(A)	9.8	.7
Norfolk, VA	475	120	20	510	90	1350	NA	0
Anaheim, CA	331	1	87	329	582	1330	5.7	.0037
Louisville, KY	404	60	15	459	165	1103	NA	NA
Oakland, CA	466	5	21	456	142	1090	NA	0
Riverside, CA	487	2	85	188	161	1028(F)	NA	0
Greensboro, NC	340	6	75	350	130	901	8.5	0
Ft. Lauderdale, FL	275	13	117	300	80	785	11.5	3
Montgomery, AL	314	1	20	387	36	758	NA	0
Albany, NY	362	4	50	115	169	700	NA	0
Huntington Beach,CA	200	25	50	250	75	600	NA	0
New Orleans, LA	354	5	13	140	6	518	NA	20
Yonkers, NY	213	2	2	269(D)	15	501	.75	0
Pensacola, FL	177	10	15	134	105	441	NA	0

*May not include all departments. (A) Does not include water and fire depts. (B) Includes some motorcycles. (C) Includes miscellaneous on/off-road, non-self-propelled vehicles. (D) Includes police fleet. (E) Includes 358 miscellaneous vehicles exclusive of listed configurations. (F) Includes 32 motorcycles, 61 scooters and 12 street sweepers. (G) Does not include police and fire depts. NA—Not available.

STATE GOVERNMENT*	Headquarters	Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	Leased
Texas (SDH & PT)	Austin	7018	106	594	1211	8248	17,177	100	0
California (DOT)	Sacramento	4569	36	296	2737	3508	11,146	NA	0
Kentucky (DOT)	Frankfort	3300	20	37	1429	4800	9586	NA	0
Ohio (DOT)	Columbus	3366	29	89	1300	4464	9248	25	0
Virginia (Hwy. Dept.)	Richmond	3700	50	55	2500	2775	9080	NA	0
South Carolina (SDH&PT)	Columbia	2761	50	352	1730	1934	6827	49	0
New York (DOT)	Albany	3310	60	103	925(C)	2400	67[illegible]	49	0
Missouri (Hwy.Dept.)	Jefferson City	1834	8	16	580	3360	5798	NA	0
Illinois (DOT)	Springfield	3127	12	300	727	NA	4166	54	0
Minnesota (DOT)	St. Paul	2245	43	55	345	1055	3743	35	0
Kansas (DOT)	Topeka	1265	17	30	257	1000	3580	NA	0
New Jersey (DOT)	Trenton	1335	7	7	679	712	2740	26.5	20
Maryland (DOT)	Baltimore	950	14	16	250	987	2217	NA	0
Connecticut	Wethersfield	1289	35	55	420	325	2124	NA	0
Wyoming (Hwy. Dept.)	Cheyenne	422	21	113	271	1276	2103	18	0
South Dakota (DOT)	Pierre	896	9	62	124	485	1576	10.2	0
Idaho (ITD)	Boise	919(D)	19	182	225(E)	NA	1345	18	0
Maine (DOT)	Augusta	638	15	6	475(F)	NA	1134	28	0

*May not include all departments. (C) Includes some vans and carryalls. (D) Includes 343 pickups. (E) Includes 129 vans. (F) Includes 238 pickups. NA—Not available.

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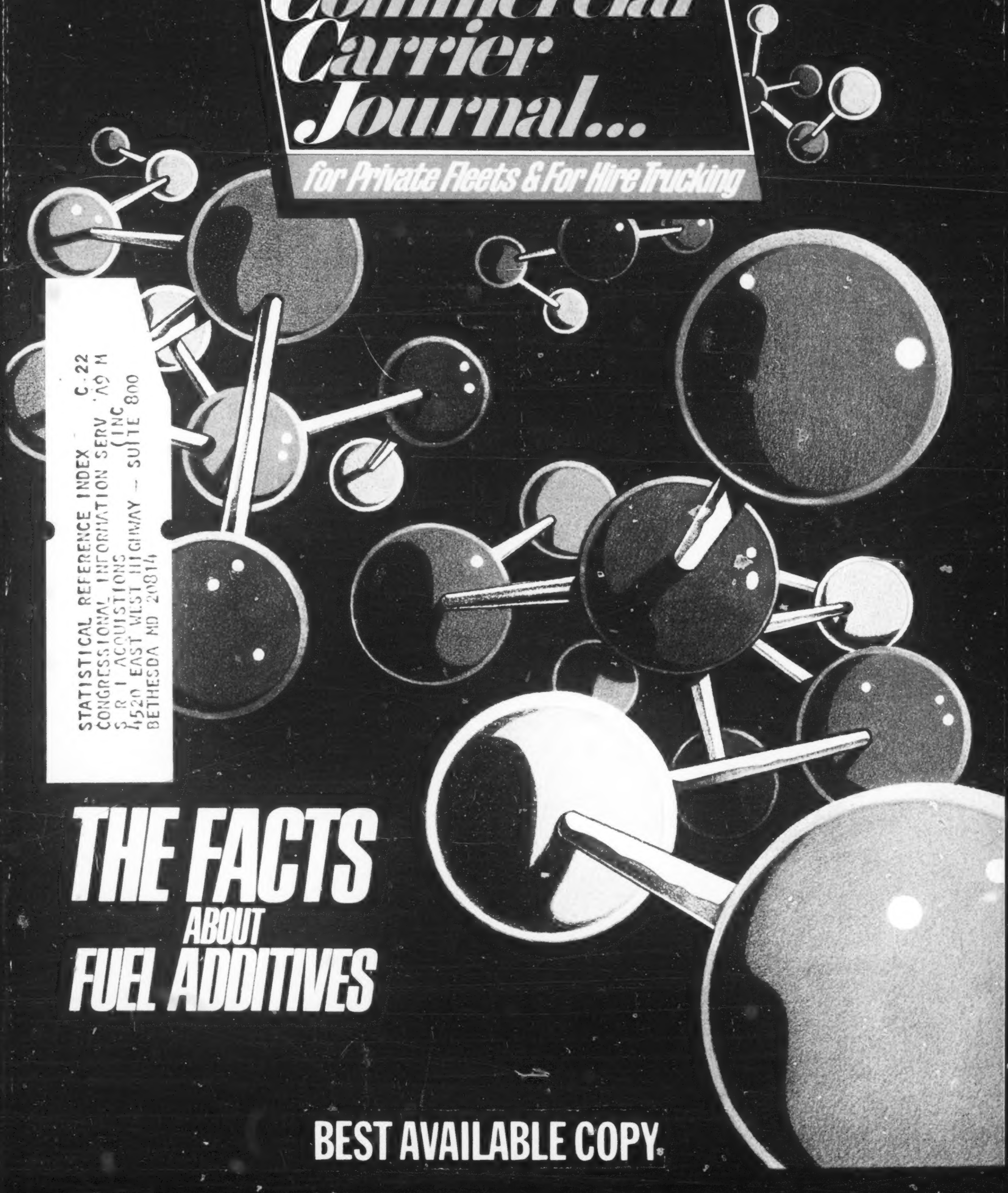
CHILTON'S JULY 1983

Commercial Carrier Journal...

for Private Fleets & For Hire Trucking



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air pressure, Davis explained. Because the Webster-Heise valve produces a type of blockage in the engine, the air pressure would change and the octane rating drop.

THe second series of tests at the Denver facility has already begun, according to Davis. Baseline evaluations without the valve have been completed, and officials are now waiting for Webster and Heise to install their device.

"We're ready to go when they are," Davis said.

NHTSA officials emphasized the tests have been conducted "fairly and on as controlled a basis as possible." Observers were present at all times, Davis said, to eliminate suspicion and reassure both sides that testing was fair and proper.

Although the device has never been tested on a truck, the inventors believe it would work well in most gasoline engine vehicles.

Webster also revealed that General Telephone and Electronics and the Bank of America have agreed to finance testing the valve on 1981 Chevrolet Citations using methanol fuel. Tests will be conducted by the California Air Resources Board. Webster said the California results may be available even before the NHTSA evaluation is complete.

Computer glitches ravage CCJ's Top 100

Commercial Carrier Journal has painfully entered the era of computerized magazine publishing. In last month's issue, the Top 100 and Second 100 charts are riddled with computer errors. As a result, some of the information in these two sections of the June issue is either misleading or confusing. Following are corrections, amplifications and four replacement columns that you can tape or paste over the affected columns in the Second 100 charts.

- **pages 91 and 93**

Maintenance Data totals shown are for 1981 and should be deleted. These totals for 1982 were not used; they are meaningless because a large number of fleets did not file this information.

- **pages 96 and 97**

Far right columns on both pages have 1982 and 1981 operating ratios listed together. Corrected columns are provided on the right.

The footnote on page 97 should be deleted.

The *Financial Data* totals listed on page 97 are for 1981. These totals for 1982 are:

- gross operating revenues: $3,608,786,000
- expenses: $3,539,307,000
- net income after taxes: $20,570,000.

Rank[1] '82	1982 Oper. Ratio	1981 Oper. Ratio	Rank[1] '82	1982 Oper. Ratio	1981 Oper. Ratio
101	97.3	96.6	151	99.7	108.8
102	98.1	98.5	152	99.7	98.1
103	98.1	93.9	153	101.0	100.0
104	89.8	88.8	154	96.9	94.6
105	88.9	86.1	155	100.9	99.3
106	100.9	98.8	156	95.6	
107	106.1	101.1	157	103.0	98.1
108	103.4	100.6	158	100.8	101.5
109	99.0	96.6	159	91.0	91.4
110	97.9	97.9	160	98.2	97.6
111	86.7	85.2	161	98.9	97.0
112	97.8	96.4	162	98.1	98.0
113	96.9	94.5	163	96.8	96.5
114	100.5	98.8	164	93.2	89.7
115	95.8	98.9	165	103.2	96.7
116	90.8	93.1	166	101.4	97.5
117	95.8	88.9	167	99.0	99.9
118	98.0	100.4	168	101.0	97.8
119	97.8	94.7	169	99.6	99.3
120	112.7	104.4	170	96.6	94.8
121	93.8	96.1	171	99.6	95.6
122	102.4	97.6	172	99.8	96.6
123	94.2	92.9	173	102.5	94.9
124	95.6	96.6	174	94.4	94.9
125	98.5	99.3	175	94.6	87.2
126	104.9	102.5	176	100.3	98.0
127	92.0	92.7	177	97.7	96.9
128	99.6	98.2	178	100.5	98.6
129	85.0	91.4	179	97.1	[illegible]
130	97.2	96.0	180	93.4	92.2
131	104.4	99.2	181	100.7	100.8
132	94.2	92.0	182	104.4	100.4
133	92.1	86.2	183	95.6	95.0
134	97.7	99.3	184	89.3	86.2
135	104.1	99.4	185	99.1	97.4
136	97.6	81.4	186	99.3	92.3
137	99.0	96.4	187	88.8	89.6
138	93.6	84.8	188	99.6	101.5
139	94.1	94.2	188	103.6	100.7
140	102.4	99.8	189	96.7	94.9
141	94.4	92.1	190	89.4	91.9
142	100.6	95.6	191	154.6	112.7
143	94.4	96.3	192	89.1	95.3
144	91.1	90.5	193	93.9	94.8
145	99.0	98.4	194	89.8	90.2
146	102.0	79.5	195	98.6	96.8
147	99.1	97.5	196	91.4	92.6
148	92.6	94.1	197	101.9	101.5
149	95.7	91.3	198	106.0	101.1
150	99.1	99.8	199	99.7	99.7
			200	99.2	97.4

Six charged by Justice Department with rate fixing

From CCJ's Washington Bureau

A grand jury investigation of trucking activities between the Northeast United States and Ontario, Canada, has resulted in the filing of a civil antitrust suit against five Canadian trucking companies and the Niagara Frontier Tariff Bureaus of Buffalo, N.Y.

The suit filed by the U.S. Justice Department is aimed at blocking alleged price fixing by the six defendants. Named in the complaint were: Bondy Cartage Ltd. of Windsor, Ontario; Dominion-Consolidated Truck Lines of Toronto; ICL International Carriers, a subsidiary of Industrial Cartage Co. which is owned by Piggy-Back Services, Inc., of Detroit; Inter-City Truck Lines of Toronto; and TNT Canada, a unit of All Trans Canada which is owned by Thomas Nationwide Transport of Sydney, Australia. Thomas Nationwide also owns Pilot Freight Lines.

The Justice Dept. alleges that the price fixing occurred between 1966 and at least until 1981. Spokesman William Baxter said the companies interfered with the right of tariff bureau members to set rates independent of the bureau's rates and so exceeded their rate-setting authority.

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AUGUST 1983

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VOLUME 140 NUMBER 8 AUGUST 1983

IN THE FEATURE SECTION:

Should professional truck drivers be tested, licensed and regulated by the federal government? After reading the story *What To Do About Problem Truck Drivers*, page 56, you may have some ideas. The editors of CCJ would like to know your feelings on this vital question. At stake is the image and the reputation of hundreds of thousands of drivers who make trucking their livelihood.

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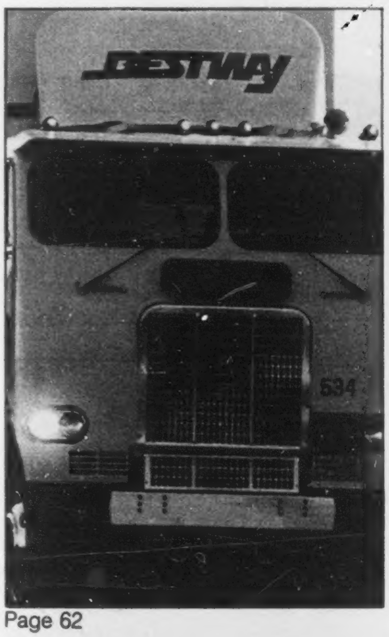

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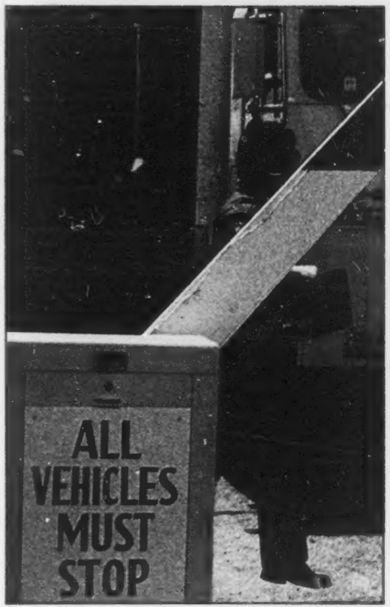

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WHAT TO DO ABOUT PROBLEM TRUCK DRIVERS

No state or governor fought harder to keep out double bottoms than William O'Neill of Connecticut. Perhaps he has justification. Last January, a professional truck driver from North Carolina crashed his rig into a toll booth on the Connecticut Turnpike. Seven people died. The circumstances surrounding that accident tragically illustrate what is wrong with trucking today. **56**

EAST MEETS WEST AT BESTWAY

This Phoenix-based for-hire carrier mixes respect and sensitivity for employees with a no-nonsense safety program making the company seem like a dream place to work. **62**

MAKING A CASE FOR SECURITY

The full burden of eliminating pilferage is now the responsibility of for-hire motor carriers. And they are not doing a very good job. Motor carrier losses from theft and pilferage are in excess of $3 billion and going up. While some ignore it, smart carriers have turned the problem around to their advantage. **66**

PRE-EMPLOYMENT SCREENING: WEEDING OUT TROUBLE

To conceal bad driving records, many drivers give false or incomplete data on job applications. The deception works because carriers have limited resources for verifying past performance. In self defense, more and more fleets are beginning to turn to pre-employment screening for help. **71**

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DEFICIENT BRIDGES
TEN WORST STATES

State	Number of Bridges in Inventory	Structurally Deficient No.	Structurally Deficient %	Functionally Obsolete No.	Functionally Obsolete %	Deficient Bridges No.	Deficient Bridges %
Texas	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Missouri	23,525	4946	21.0	11,405	48.5	16,351	69.5
Kansas	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Iowa	26,217	5707	21.8	7600	29.0	13,307	50.8
Oklahoma	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No. Carolina	15,424	5680	36.8	5585	36.2	11,265	73.0
Mississippi	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Indiana	17,650	4684	26.5	5987	33.9	10,671	60.4
New York	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nebraska	16,413	4829	29.4	5412	33.0	10,241	62.4

Structurally deficient bridges cannot accommodate the truck weight for which they were originally designed. They are either posted with weight restrictions or closed entirely.

Functionally obsolete bridges have geometric features which do not safely accommodate current traffic volumes. A single-lane bridge that joins two-lane highways and restricts the flow of traffic is an example.

Developed by the Highway Users Federation from information listed in DOT's "Highway Bridge Replacement and Rehabilitation Program — Fourth Annual Report to Congress." Figures current as of December 31, 1982.

Mianus River span failure points up nation's need for massive bridge repair program

By **LEO ABRUZZESE,** *Washington Editor*

More than 250,000 U.S. bridges are either structurally deficient or functionally obsolete, the Department of Transportation has acknowledged in the wake of last June's fatal collapse of the Mianus River Bridge on a stretch of Interstate 95 in Connecticut.

However, an industry engineer said problem bridges will not affect the vast majority of truck fleets and suggested "there is little to worry about" in terms of frequent future catastrophies.

Richard Lill, a highway engineer with American Trucking Associations, said: "Since the majority of these deficient bridges are on smaller highways where trucks don't travel anyway, there shouldn't be much effect on the industry."

According to the Federal Highway Administration, 132,154 bridges are structurally deficient. This means they cannot accommodate the truck weight for which they were originally designed and are either posted with weight restrictions or closed.

Functionally obsolete bridges, of which there are 121,042, cannot safely handle current traffic volumes, i.e., a single-lane bridge that joins two-lane highways, rstricting traffic flow. Many of these bridges are on county and township roads where little commercial trucking takes place, Lill said.

Because local governments rate bridges according to their load carrying capacity, he added, structurally deficient bridges should not prove hazardous for truck fleets. "The safety restraint is there," Lill said. "Posted signs mean no vehicle should be operating on that bridge that would put it in danger."

There are 565,443 highway bridges on public roads in the U.S., according to the Department of Transportation. Of the 253,196 deficient bridges, 68,645 are located on the federal-aid system. However, the majority of defective spans are found on so-called "off-system" roads where construction and maintenance are the sole responsibility of the states.

According to DOT's Highway Bridge Replacement and Rehabilitation Report, 3500 bridges on the federal-aid system become deficient each year. Off-system bridges are not deteriorating as quickly, the report says, probably because a higher percentage are already considered sub-par.

Half of all deficient bridges are located in 10 states, according to an analysis prepared by the Highway Users Federation (see chart). In Texas alone, there are more than 17,000 problem bridges, while in North Carolina, more than 7 out of every 11 are inadequate in some way.

Federal officials say it would cost $48.9 billion to repair or replace all of the

Continued

LATE NEWS WIRE

The National Truck Equipment Association reports that the strongest period of 1983 in the sale of Class 8 trucks will be in the fourth quarter. NTEA says the sale of trucks 33,001 lb and over reached its lowest point at the end of 1982, falling 14.5% below 1981 levels. But NTEA also says sales of Class 8 vehicles will increase 14.7% this year, jumping even higher to 25.5%—over the second half of 1983—in the first half of 1984. The association is predicting 116,200 Class 8 sales in 1984, making it the strongest year since 1981. Sales of Class 6 and 7 trucks, however, will continue to be slow.

P.L. Cowling, intermodal vp for The Milwaukee Road, told members of the Northwest Shippers Advisory Board the "45-foot trailer is coming on faster than most [of us] ever envisioned and much faster than the flat [railroad] car can be modified to keep pace." Seventy-five percent of the van-type trailers being produced today are 45 ft or longer, the Truck Trailer Manufacturers Association reports. Cowling also said only about half or 25,597 trailer trains can accommodate the 102-in. trailer, while another 11,700 can be modified to handle it.

States adopting the federal truck size and weight regulations now include the following: Arizona, Arkansas, Colorado, Georgia, Hawaii, Idaho, Indiana, Iowa, Kansas, Maine, Maryland, Minnesota, Mississippi, Missouri, Montana, Nebraska, New Jersey, North and South Dakota, Tennessee, Texas, Vermont, Virginia, Washington, West Virginia and Wyoming.

Brae Corp. of San Francisco arranged financing and sale of $16 million of piggyback trailers to a limited partnership. Brae says it will be the equipment manager for the partnership.

BEST AVAILABLE COPY

Canadian truckers are invading U.S., ATA says

From CCJ's Washington Bureau

More than 400 grants of operating authority have been awarded to Canadian-owned or domiciled motor carriers since President Reagan lifted his international trucking moratorium last November, American Trucking Associations said last month.

In a statement submitted to the Ontario Highway Transport Board, ATA said the Interstate Commerce Commission has been routinely processing Canadian carrier requests while U.S. based carriers received "less than a handful" of operating grants from any Canadian province in the last six months.

The U.S./Canadian trucking dispute began in late 1980 after the Motor Carrier Act greatly eased entry into the American industry. Canadian fleets began applying for U.S. authority while American carriers encountered restrictive public convenience and necessity tests north of the border.

After a brief moratorium, the U.S. and Canadian governments signed a bilateral accord last December that set up a consultative mechanism to iron out future border disputes. However, the basic inequities between the two nation's entry policies remained unchanged.

"In many cases," ATA said, "the authority received by the U.S. carrier in Canada resulted from the purchase of an existing Canadian carrier. Thus, while the party operating the authority may have changed, the number of carriers operating in the market in question did not change."

The American industry claims that the 400 grants to Canadian carriers represents much new competition for U.S. fleets, many of which are restricted to serving Canadian customers on an interline basis. Most grants to Canadian carriers are for direct single line service.

ATA also claims the ICC allows most Canadian applicants to provide domestic, interstate service within the U.S. while provincial authorities rarely allow American carriers to serve intra-Canadian markets.

"U.S. carriers," says the association, "are now faced with increased competition not only for their traditional share of the transborder freight, but domestic U.S. freight as well."

In a related development, the Canadian Manufacturers Association advised the OHTS that regulatory reform is overdue and urged elimination of historically retrictive policies like the public convenience and necessity test.

"The Ontario trucking industry is mature and stable enough to withstand a freer entry process and competition from U.S. based carriers," CMA said, adding "...we see no reason why direct line transborder transportation should be reserved for Canadian-based carriers to the exclusion or restriction of American motor carriers."

While the industry is concerned over Canadian truckers, similar threats from Mexican truckers have eased due to that country's economy.

Mianus River span failure points up need Continued

deficient bridges in the U.S.—$26.7 billion for those on federal-aid highways and $22.2 billion for off-system bridges.

The Surface Transportation Assistance Act, approved by the Congress last December, provides substantially increased funding for bridge repair. The federal government will spend $1.60 billion on bridge work this year, 78% more than the $900 million earmarked for 1982. By 1986, DOT will be allotting $2.05 billion annually for bridge rehabilitation.

The federal government supplies 80% of all highway and bridge funding; the states must raise the remaining 20%.

Woodrow W. Rankin, a spokesman for the Highway Users Federation, confirmed: "States are raising their own highway user taxes to fix up roads and bridges." Industry associations, especially ATA and the Private Truck Council of America, believe trucks are being singled out for unfair tax treatment and are fighting hard for reasonable levies. Rankin warned that money must be available, however, because "we have an enormous number of bridges in this country, many of them old bridges never designed to carry today's traffic volumes."

Federal officials acknowledge that truck traffic on many bridges exceeds what the span was originally designed to handle. But Stanley Gordon, chief of the bridge division of FHWA's Office of Engineering, says heavy truck traffic won't cause a collapse like the Miamus River incident.

Over time, Gordon explained, steel used in bridge construction begins to weaken or "fatigue." Bridges have a stress range and are designed for a certain amount of wear. "A bridge can't even tell when a car is on it," Gordon said, "but it can tell when a truck rolls over." If there is a substantial increase in truck traffic beyond what the bridge was built to handle, the bridge's life can be reduced. "Instead of lasting 100 years, for example, it may only last 75 years," Gordon explained.

Steel fatique, brought on by increased truck traffic, can cause small cracks. However, crack growth is slow if the metal is tough, and bridge inspectors are trained to spot problems, Gordon said.

Although the cause of the Mianus River Bridge collapse is still officially under investigation, steel fatique apparently was not a factor. One industry engineer described it as a "hung" bridge, suspended by hangers. "If one of the hangers fails, you have a collapse," he said.

EDITOR'S NOTE: In The June Top 100 report, CCJ reported that J.B. Hunt Transport, Lowell, Ark., was basically an owner operator company. Kirk Thompson, financial vice president, says J.B. Hunt has only three owner operators out of 500 company drivers.

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